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KANTAR WORLDPANEL

A Global Ranking of the Most Chosen Consumer Brands

BRAND FOOTPRINT

Foreword

by Sir Martin Sorrell

Brand Footprint, a global study of winning brands in the FMCG space, offers readers a fresh perspective and the chance to look beyond conventional wisdom to new opportunities.

This edition – its fourth – paints a comprehensive picture of brand growth over the past year, identifying the strategic levers that brands can pull in order to attract more buyers.

A powerful component of WPP's and Kantar's portfolio of reports, Brand Footprint is grounded firmly in the reality of FMCG commerce: real choices by real people in real markets across the world.

Sir Martin Sorrell
Founder and CEO, WPP

Contents

Cover photo: Aniko Villalba, travel photographer, http://www.anikovillalba.com

Brand Footprint: Inspiring brand growth

What can we learn from brands winning at the moment of truth?

This year's Brand Footprint builds on the simple rule that growth is all about penetration, and demonstrates how brands have grown against a challenging economic backdrop.

Penetration is at the core of Kantar Worldpanel's exclusive Consumer Reach Point metric, allowing us to rank the best of global and local brands by that most important of things – how often they are chosen by consumers.

Every year at Kantar Worldpanel we conduct the most exhaustive study of FMCG brands across the globe, identifying the key elements that drive growth. Brand Footprint casts a light on this, giving marketers, brands and agencies a solid basis on which to make business decisions that will lead to success.

2015 taught us emphatically that uncertainty will continue to reign, but with astute marketing the best FMCG brands will find a way to grow. The global economy has continued to struggle, expansion slowed in China, Europe teetered on the verge of recession, and tensions in the Middle East showed no signs of release.

1
BRAND FOOTPRINT Report

5
Continents

44
Countries

200
Categories

15,000
Brands

300bn
Shopper decisions

This year's study is the biggest yet – covering 15,000 brands, 200 categories, 44 countries and five continents, representing 74% of the global population.

Brand Footprint now commands a larger global footprint than ever before. Thanks to our Europanel partnership, Kantar Worldpanel is able to incorporate new geographies. Specifically, via our partnership with GfK, adding Poland, Turkey and South Africa to the study and IRI who provided the US data. Thanks also to IMRB for adding Bangladesh and Sri Lanka for the first time. Meanwhile, new Kantar Worldpanel rankings from Nigeria, Ghana, Egypt and Kenya will allow us our first glimpse of Africa.

The following pages see our experts identify and examine five strategic 'levers' that are key to brand growth. Throughout the report you will see examples of brands that have been increasingly chosen by consumers, and read how they have achieved this.

However, the focus of this year's report extends beyond the top 50 ranking as the pressure from local brands continues to bear on their global competition. While reflecting the growth of smaller and local brands, we also scrutinise more niche players, looking at both local brands and brands poised to break into the ranking.

Whether you're a global, local or fledgling player, I congratulate every brand that features in this report, which I hope serves both as a comprehensive look back at 2015 and as a roadmap for growth in the years to come.

Josep Montserrat
CEO, Kantar Worldpanel

2015 in FMCG

Brand Footprint at a glance

FMCG is one of the few industries selling to 100% of consumers around the globe. Understanding the billions of FMCG choices made over a year reveals a snapshot of how people – whether in a small village in India or a penthouse apartment on New York's Fifth Avenue – satisfy their most basic needs.

Beyond the Top 50 ranking, Brand Footprint's unique CRP metric gives it licence to reach into over one billion households across 44 countries in five continents.

Uncovering local tastes, trends and behaviours and how these manifest in actual shopper decisions, it also explores how these change under the lenses of socioeconomics and geography, ultimately showing where to find headroom for growth.

GLOBAL FMCG: THE LONG VIEW

Set against a subdued global economic backdrop, it is unsurprising that growth in FMCG sales has been steady rather than spectacular.

> At the current rate of growth, by 2017 emerging markets will account for more than half of global FMCG sales

Meanwhile our data shows that consumers are paying more for fewer foods. The value of FMCG sales increased by 4.7% in 2015; volumes declined by 0.4%, a trend driven primarily by the United States, Latin America and Asia.

Specifically, brands struggled to increase food and beverage consumption, with volumes down globally by 0.6%. The chance to change people's habits, create new usage occasions, and migrate both categories and brands from one market to another have helped home care (volumes up 0.6%) and personal care (up 0.3%) continue to grow.

CONSUMER REACH POINTS (CRP)

POPULATION
How many households in a country

PENETRATION
How many households buy a brand/universe

FREQUENCY
How often each household buys it on average in a year

GROWTH HOTSPOTS

Emerging markets revenue growth has slowed in the last year, halving from 12.4% to 6.7%, but this remains considerably more robust than developed markets, where sales rose by 1.3%. Indeed, emerging markets accounted for 82% of FMCG growth in 2015, with star performers including China, India, Turkey and South Africa.

While eight in 10 of all shopping decisions take place in emerging markets, the 15% of the global population living in developed countries spend nearly four times more per head in absolute terms.

> Spend on local brands has increased by 6.2%. Local players grew by $41 billion in 2015

The global average shopping decision is worth $2.1; $3.7 in developed markets and $1.4 in emerging markets. These figures will vary by the brand and category purchased. A Chinese shopper buying Lancôme skincare, for example, will spend on average $82; a Spanish shopper will spend $65 on Estee Lauder.

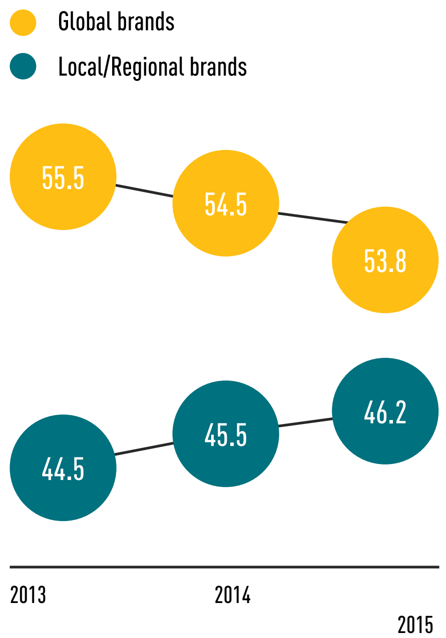
However, in the food category, the average Chinese shopper will spend $0.68 on Wanh Shou Yi, a popular local seasoning brand.

Back in Spain, the average shopper will spend $1.30 on Risi snack brands. The same shopper will often make very different purchasing decisions depending on the category and the context. It is every marketer's responsibility to understand both the category, the context and the distribution of prices paid for the brands in their competitive set.

LOCAL BRANDS CONTINUE TO OUTPACE GLOBAL

Our analysis of 9,000 local brands shows that these nimble local players are proving better at exploiting growth opportunities than the 5,700 global brands included in the Brand Footprint report.

DECLINE OF GLOBAL AND RISE OF LOCAL BRANDS, % SHARE.



Sources: Kantar Worldpanel – GFK – IMRB – 2015 – FMCG

Local brands are particularly strong in the food and beverage categories, catering to native tastes. In large emerging markets such as China, India and Indonesia, many consumers see local brands as not only familiar but also more affordable and widely available.

Brand choices are dominated by local players in terms of both the number of brands available and CRPs. But spend still tips in favour of the multinationals: local brands make up 46% of sales compared to the 54% from global brands.

Perhaps this is because the value of an average shopping decision tends be lower for local brands. Local brands command almost double the spend of purchases below $2USD, but as the price point increases, so too does the likelihood that global brands will win.

This, however, is changing. Growing share in Asia, Latin America and also parts of Europe including Greece and Spain, local brands saw spend increase by 6.2% in 2015; nearly twice the rate of their global counterparts.

Local brand growth can be attributed to three key drivers. Firstly, the country that they operate in is their world leading to better concentration on fuller regional distribution. Secondly, where global brands are better suited to modern trade, local brands fare better with traditional trade and will therefore flourish in emerging regions. Finally, local brands fill the 'affordability gap,' bringing products to consumers who would otherwise be unable to buy them.

By no means does this indicate that growth is over for global brands. Within the top 10 brands alone, Lifebuoy, Lay's and Dove all managed to not only grow CRPs, but also move at least one place up the ranking.

TOP RECRUITERS

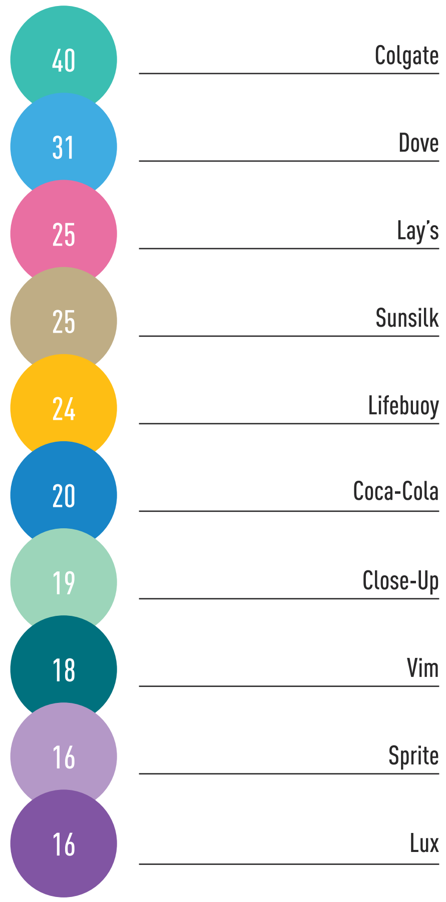
Gaining new buyers is key to growth and, in 2015, some of the world's biggest brands have added to their – already considerable – buyer base. Despite already being bought by two thirds of households worldwide, Colgate still managed to acquire an additional 40 million households. With their global reach, other personal care brands adding substantial penetration include Dove (31 million extra households), Sunsilk (25 million) and Lifebuoy (24 million).

The ranking tells us that there is room for any brand to thrive, whatever the markets and economic conditions in which they operate.

This year's Brand Footprint report focuses on the broader strategies and tactical options that brands – large and small – have followed in order to grow.

TOP 10 RECRUITERS

Households gained in 2015 (m)



Source: Kantar Worldpanel – 2015 v 2014

Fundamentals Of Brand Growth

It's the perennial question on the lips of marketing bosses worldwide: How do brands grow? The question isn't just asked in a theoretical way; a sound understanding of the principles behind brand growth is important. Increasingly, marketers are seeking evidence-based guidance on how to proceed.

At the heart of what we do is a fundamental belief that scientific evidence starts with observation of shopper behaviour.

Brand Footprint remains wedded to proven doctrines; drawing upon the evidence-based principles to help lay out a clear roadmap for growth in the FMCG market.

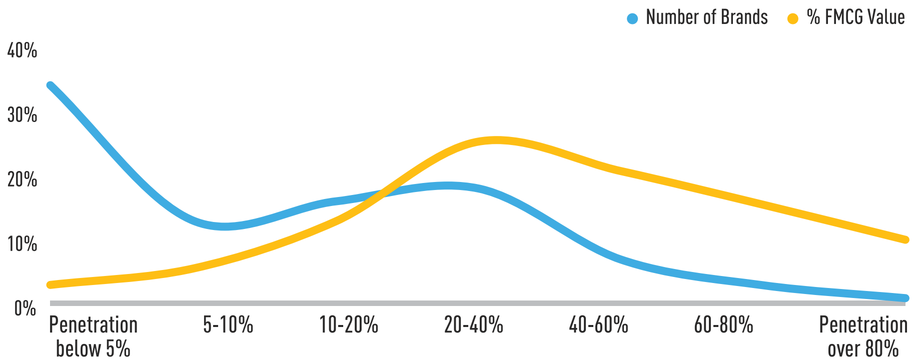
Our proprietary data – tallied with consumer and shopper behaviour insight, as well as Europanel's Brand Growth 2020 (BG 20) study – confirms the strength of these principles; ultimately allowing us to identify and confirm the golden rules below; crucial to a sustainable growth strategy.

Only 2% of all the brands analysed reach more than 80% of a country's households

PENETRATION IS KING

Brand growth and brand size are both driven by the number of buyers. This remains true across demographics, developed and developing countries and frequently or infrequently purchased categories and brands.

ONLY 2% OF ALL BRANDS REACH MORE THAN 80% OF A COUNTRY´S HOUSEHOLDS



Source: Kantar Worldpanel, 2015, FMCG

Of all the brands that grew over the past year, 79% of them did so by recruiting more shoppers. Colgate's performance is case in point. In 2015, it boosted global penetration to 67.7% adding 40 million new households to its buyer base, more than any other brand in the ranking.

This indicates plenty of headroom for growth, even among the largest brands. Our data shows that the average brand included in the Brand Footprint Top 50 ranking has a global penetration of just 20.2%. In fact, only 2% of all the brands analysed reach more than 80% of a country's households. Nearly one third command less than 5% penetration.

A lot of marketing time and effort is directed at brand buyers, to the detriment of finding the blind spots, the people who don't buy your brands. There are plenty of categories where overall adoption rates remain low. In personal care for instance, more than 40% of the global population does not yet purchase deodorants, hair conditioner or make-up.

YOUR BUYERS DON'T BELONG TO YOU

Consumers by their nature are not monogamists; they are polygamists, with even the most loyal flitting away into the arms of rivals. The flip side of most buyers choosing your brand infrequently is that the vast majority are also sampling other brands as part of their repertoire.

Even looking at the biggest brands, for instance in the UK, we see that they only command an average loyalty figure of 36%. In fact, for those 10 biggest brands in their biggest categories, their most loyal shoppers only account for 8% of brand spend.

MOST BUYERS ONLY BUY YOUR BRAND ONCE

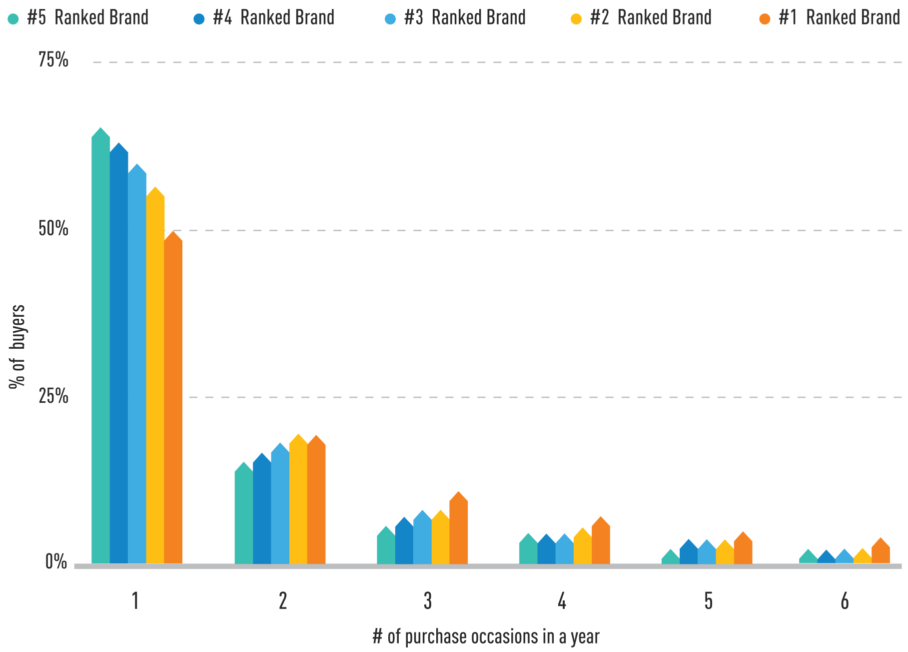
Of course, if Colgate can persuade every one of those households to buy its brand on just one more occasion within a 12-month period, then it will have significantly increased annual sales. This is the argument that makes chasing increased frequency look tempting.

However, every brand – regardless of its size – has a frequency curve of a similar shape.

Most buyers will buy once; the second largest proportion will buy twice, and so on. This is a pattern universal to all brands and all categories. Individually, these light buyers may seem insignificant, but their collective contribution to your brand's success is invaluable. Ignore them at your peril.

The good news is that brands achieving a higher penetration nearly always see an accompanying increase in purchase frequency.

SMALLER BRANDS MORE RELIANT ON ONCE ONLY BUYERS
BUT THE SHAPE REMAINS THE SAME



Source: Europanel, BG 20: Top 10 Brands in 80 categories – France, UK, Germany – 2015

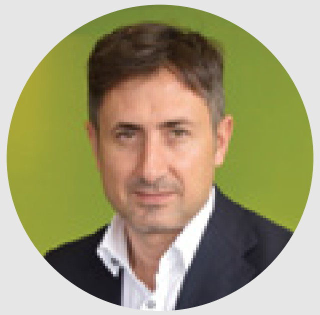
Around half of this year's new buyers won't buy your brand next year

BUYER BASES ARE IN CONSTANT CHURN

No matter how successful you are at attracting new buyers, be aware that around half of them will not buy your brand the following year. Sometimes this is conscious rejection but is more often circumstance. You weren't listed in the store they visited. You were out of stock. You weren't on promotion. You simply weren't top of mind.

As a consequence, even for a brand's penetration to remain flat there has to be a constant recruitment of new shoppers, and that's before considering the incremental buyers needed for growth.

BRAND GROWTH IN PRACTICE



The most important moment for a brand is when an individual actually purchases it. The key strategic metric leading to brand growth is penetration growth.

It is now widely accepted that you need to increase physical or mental availability to grow a brand's penetration.

In the first case, smart distribution is key to increase the number of locations in which a shopper can choose your brand - physically or digitally, in and out of home. This needs to be seamless with the right assortment, at the right price so that each occasion and demand space gets fulfilled.

On the other side, creating "empires in the mind" through advertising and engagement programs help maximise the likelihood that your brand will be remembered, considered, sought and sometimes, command a price premium.

Each brand is a story and though there are many drivers for growth, this new edition of Brand Footprint together with Europanel's BG 20, confirms that there is hardly any brand growth in FMCG without penetration development. Here, we explore the five strategic options that provide the greatest impact in reaching that goal: more geographies, more demographics, more occasions, more categories and new categories.

Luis Simoes, Global Chief Strategy Officer, Kantar Worldpanel

MORE OCCASIONS

Many manufacturers have enormous headroom for growth by better understanding changing consumer habits. As global populations grow, younger generations with different attitudes command more spending power and the landscape of consumer needs and shopper missions will further fragment.

The rising affluence across Asia, the growth of the 'greys' in Europe or the boom of the millennial generation across many of the developing markets; these social shifts offer a multitude of opportunities for agile manufacturers.

The key to building greater demand for a brand lies in spotting the opportunity early and innovating to satisfy the resulting needs and occasions.

- Colgate capitalised on the rise of affluence and personal hygiene in India when it launched

The ultimate reward is finding more buyers for your brand as you satisfy new and emerging needs and occasions

Oral Health Care Month. Built on the finding that 47% of India's population had never visited a dentist, Colgate provided free dental check-ups, an offer taken up by 4.9 million consumers.

- A deep understanding of local events, culture and lifestyle is critical in order to identify new occasions, as shown by Yakult helping consumers remain hydrated during Ramadan and Lifebuoy's Red packet celebrating Chinese New Year.

MORE CATEGORIES

Moving your brand across categories means that you can both attract new buyers to your brand and give existing customers a reason to buy more.

Many brands have used the equity, trust and goodwill they have built in existing categories as they expand into adjacent categories.

- Dettol is a great exponent of this approach. Starting as an antiseptic liquid over 80 years ago, its portfolio has expanded to soaps, liquid soap, shaving cream, plasters and several other products which trade on its strong brand equity.

Most recently, it conducted research finding that 80% of children's cuddly toys harbour potentially dangerous bacteria. The resulting 'Care For Your Bear' campaign successfully reiterated the promise of its anti-bacterial laundry cleanser to kill 99.9% of germs on a child's teddy.

LEVERS FOR GROWTH

MORE DEMOGRAPHICS

We have mounting evidence that most successful growth strategies are built through converting non-shoppers either through advertising, line extensions or NPD efforts.

- While Axe is a brand very much targeted at young men, Axe Black has looked to keep them with the deodorant brand as they grow older.
- Unilever's Dove has trialled a baby range in Brazil, potentially opening up a whole new worldwide demographic.

It is not just traditional demographics such as age and gender that are important. Opportunities multiply when you consider how people think, feel and use brands.

- Pasta maker Barilla has been rolling out gluten-free options, making the brand and category available to a whole group who would not previously have considered it.
- In India, Dabur has launched a smoker's toothpaste, specifically designed to counteract the effects that tobacco has on teeth.

MORE GEOGRAPHIES

As only one brand in the ranking has a global penetration of more than 50%, every manufacturer has an opportunity to expand across geographies. But, to achieve significant penetration in a new country, brands must choose: either to adapt products and positioning to the local market, or trade on their native heritage.

- Snack brands Lay's and Doritos have proven to be masters of this strategy, with the former launching in Brazil and Italy and the latter into India.
- A number of brands are expanding out of their Asian strongholds, such as Yakult into Myanmar and UAE, and Indomie noodles to Turkey.
- Another way of entering a new market would be to acquire a local brand, one that already enjoys a status and customer base, making you relevant locally from the start. US brewing giant Anheuser-Busch InBev last year agreed to buy SAB Miller, increasing its presence in the UK, Latin America, Asia and moving into Africa for the first time.

"You should look at where you've got the most potential for products you already manufacture in a particular category," advises Paul Murphy, Kantar Worldpanel's Global Director of Data Science. "Conduct an overview of the category in that market and establish to what extent you can gain market share."

NEW CATEGORIES

Perhaps the Holy Grail for the marketer is to establish a new category – no mean feat in a marketplace bursting with categories and littered with failed attempts to carve out a new niche.

If successful, it will allow a brand to add value to its portfolio; and while other brand owners will follow and look to replicate its success, it gives the first to market the enviable position of being the name most associated with that category.

- The big laundry brands have excelled at creating new categories, with Lenor Unstoppables creating a range of scent boosters and, this year, Downy Fresh offering a deodorant for clothes.
- If you're as clever as Amore Pacific, you might find you can create a new category with an existing product, by swapping its primary and secondary attributes. Its Colour Control Cushion Compact was originally launched in South Korea in 2008 as a sun protection product that happened to have a colour tint. However, it failed to ignite demand, until it was repositioned in 2012 as a foundation that happened to have a sun protection factor (SPF)

Brand Footprint Global Ranking Top 50

Rank 2015	Rank 2014	Rank Change	Brand Name	Manufacturer	Consumer Reach Points (m)	Penetration % 2015	Frequency 2015	Consumer Reach Points Growth %
1	1	=	Coca-Cola	The Coca-Cola Company	6,284	45.8	13.5	-2
2	2	=	Colgate	Colgate-Palmolive Company	4,251	67.7	6.2	2
3	4	↑	[illegible]	Unilever	2,585	30.3	8.4	3
4	3	↓	[illegible]	Nestlé	2,412	33.8	7.0	-17
5	7	↑	Lay's	PepsiCo	2,198	30.5	7.1	4
6	5	↓	pepsi	PepsiCo	2,164	25.3	8.4	-1
7	6	↓	Nescafé	Nestlé	2,047	22.2	9.1	-5
8	9	↑	Indomie	Indofood	1,898	5.0	37.2	2
9	8	↓	Knorr	Unilever	1,859	31.4	5.8	-2
10	11	↑	Dove	Unilever	1,674	38.8	4.2	8
11	13	↑	sunsilk	Unilever	1,584	24.4	6.4	12
12	10	↓	LUX	Unilever	1,529	35.3	4.3	-2
13	17	↑	Downy	P&G	1,432	14.9	9.5	11
14	15	↑	Sunlight	Unilever	1,417	12.3	11.4	5
15	12	↓	Nestlé	Nestlé	1,386	30.9	4.4	-3
16	16	=	[illegible]	P&G	1,259	25.9	4.8	-3
17	18	↑	Palmolive	Colgate-Palmolive Company	1,232	18.9	6.4	3
18	14	↓	Pantene	P&G	1,198	24.2	4.9	-14
19	19	=	Pepsodent	Unilever	1,074	14.8	7.1	1
20	22	↑	Sprite	The Coca-Cola Company	1,050	26.5	3.9	4
21	21	=	Danone	Danone	1,047	15.9	6.5	1
22	20	↓	Kraft	The Kraft-Heinz Company	978	16.0	6.0	-8
23	27	↑	Ajinomoto	Ajinomoto	948	6.9	13.5	4
24	23	↓	Heinz	The Kraft-Heinz Company	946	18.7	5.0	0
25	24	↓	Oreo	Mondelez	929	25.1	3.7	-1
26	29	↑	[illegible]	P&G	918	24.4	3.7	3
27	25	↓	[illegible]	Nestlé	901	8.4	10.6	-3
28	28	=	Fanta	The Coca-Cola Company	877	23.0	3.8	-2
29	26	↓	Bimbo	Bimbo	859	6.4	13.3	-6
30	32	↑	Surf	Unilever	844	7.0	11.8	2
31	33	↑	[illegible]	PepsiCo	829	16.5	4.9	0
32	30	↓	Tang	Mondelez	825	11.5	7.0	-7
33	37	↑	[illegible]	Unilever	801	15.1	5.2	9
34	36	↑	[illegible]	Beiersdorf	792	24.1	3.2	3
35	34	↓	Cheetos	PepsiCo	791	15.3	5.1	-1
36	35	↓	[illegible]	Unilever	790	18.4	4.2	2
37	31	↓	[illegible]	Danone	767	13.2	5.7	-8
38	38	=	McCormick	McCormick & Company	757	14.4	5.2	3
39	39	=	[illegible]	Unilever	751	17.6	4.2	3
40	40	=	Kinder	Ferrero	750	13.7	5.4	3
41	42	↑	[illegible]	PepsiCo	742	13.0	5.6	4
42	41	↓	[illegible]	P&G	701	13.3	5.2	-3
43	48	↑	[illegible]	Unilever	686	19.1	3.5	9
44	43	↓	Hershey's	The Hershey Company	673	11.2	5.9	-2
45	45	=	[illegible]	General Mills	646	10.0	6.4	0
46	51	↑	Barilla	Barilla Group	640	13.5	4.7	7
47	50	↑	Yakult	Yakult	638	8.7	7.2	4
48	47	↓	Yoplait	General Mills	630	10.5	5.9	-1
49	49	↑	[illegible]	P&G	629	16.0	3.9	1
50	46	↓	Gillette	P&G	615	22.4	2.7	-4

Source: Kantar Worldpanel, IRI (USA), GFK (Russia, Turkey, South Africa, Italy, Poland, Germany), IMRB (Sri Lanka, Bangladesh) – 2015

Fastest Growing FMCG Brands

Each year Brand Footprint strives to highlight exceptional brand growth; not just among the global Top 50 ranking but across different regions, categories and countries.

Also profiled are two junior brands (those under 10 years old) making a significant dent in the market and challenging their elder competitors.

Together, these are potentially the next generation of brand giants: each increasingly winning at the moment of truth.

TOP 10 GLOBAL RISERS

12.0	Sunsilk
10.8	Downy
9.5	Vim
8.9	Close-up
7.6	Dove
6.7	Barilla
5.1	Sunlight
4.2	Yakult
3.9	Sprite
3.8	Lay's

Source: Kantar Worldpanel – Global – Based on CRP Growth 2015 v 2014

HIGH FLYERS

NUTELLA: Pancakes love Nutella

Italian brand Nutella celebrated a highly successful 2015, seeing positive growth in all regions, and climbing five places in the global ranking.

Recruiting 7.2 million new shoppers over the course of the year, Nutella is among the fastest growing brands in the top 150 ranking. Growth is most notable in the Middle East where it rose 14 places in the ranking and experienced a 24.3% increase in CRPs.

In 2015, the brand tapped into and promoted a 'new' usage occasion: Pancake Day. Already a Shrove Tuesday favourite, it built on these existing memory structures and opened up opportunities to engage with hungry consumers, providing downloadable Nutella Pancake Day Party invitations for hosts to send out.

Such is the strength of this association, many retailers that recognised Pancake Day as a shopping occasion, accordingly placed jars of Nutella alongside the traditional lemon and sugar toppings on shop floors.

RED BULL: Flying up the ranking

Café, bar and other out of home outlets serve up important innovations that later end up selling in the take-home channel. Nearly 30 years ago Red Bull energy drink started out primarily as a drink sold in European bars. Linking with a variety of extreme sports has helped make Red Bull one of the fastest growing beverages brands, its CRPs up 16.4% globally.

The Zero Calories variant has appealed to health conscious millennials – Red Bull's target demographic. Zero Calories editions in orange and cherry flavours have been launched via Instagram and advertised with bespoke messages on trains, on cycle routes and in fitness clubs to capture the attention of key young drinkers.

In 2015, Red Bull jumped 11 places up the Brand Footprint ranking. It now sits in the top 100 global brands for the first time, with exceptionally high CRP growth in the Thai, Chinese and Italian markets.

RAPID RISERS

DOWNY: Scent of a woman

The P&G fabric softener remains one of the fastest growing global brands for the third year running. This year, it continues to go from strength to strength, increasing its CRPs by 10.8%. Growth has been largely fuelled by the Asian markets where it continued to expand by encouraging an extra product to become a core part of the laundry cycle.

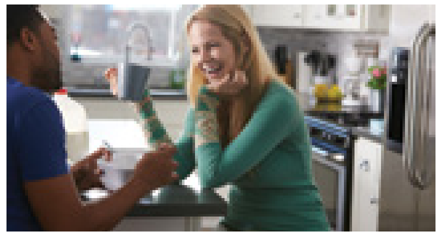
In 2015, for example, the Timeless Collection was launched in Asia, reaching into occasions long confined to the personal care space such as perfumes. Each product in the range was designed by famous fashion houses to emulate the scent of iconic movie stars. Using the tagline "Do men notice their women?" the brand drew a groundbreaking but convincing connection between a woman's laundry scent and her personal style and allure.

Following a similar strategy aimed at families, Downy extended its Infusions line with a Sweet Dreams collection. The new collection uses the tagline 'Tuck in, Turn off' during Sleep Awareness Week. A new category, which added to consumers' laundry repertoire, invited shoppers to enjoy the benefits of calming scents on their bed linen. A good night's sleep, said Downy, starts in the laundry room.

JUNIOR BRANDS (SELLING FOR LESS THAN 10 YEARS)

DOLCE GUSTO: The modern art of coffee

Nestlé's Dolce Gusto brand continues to move up the ranking, increasing its CRPs by 12.3% in 2015 and recruiting 2.3 million shoppers. Europe remains the brand's heartland, posting double digit growth in Spain (+10% CRP), France (+20.5% CRP) and particularly the UK: a small market growing fast with a 26.5% CRP uplift.



Dolce Gusto is likely to begin realising its global ambition, as its first manufacturing facility outside Europe opened in Brazil this year.

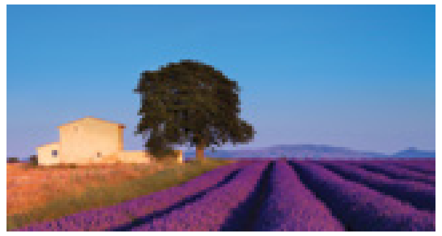
Coffee capsules as a category are becoming increasingly popular, bringing an out of home experience back into the house in a convenient way. Consumers are happy to pay the premium compared to standard roast and ground or instant coffee.

They are quintessential of the ongoing relationship between technology and FMCG: skilfully bringing both together to create a new, lucrative category.

2015 saw the launch of Dolce Gusto's Drop, a high-end coffee machine complete with a sleek design 'inspired by a drop of coffee'. The campaign brought in the age of the 'modern art of coffee,' with 30 different flavour pods from Macchiato to Chai Tea Latte.

LE PETIT MARSEILLAIS: Traditional French beauty

Personal care brand Le Petit Marseillais has long been a favourite in its native France, ranking second most chosen health and beauty brand.



Acquired by Johnson & Johnson 10 years ago, the brand's distinction lies in the effective export of its traditional Mediterranean heritage. With a promise of naturalness, purity and authenticity strong in is the Le Petit Marseillais brand essence; the acquisition has seen it become increasingly popular with its continental neighbours: Spain, Greece and Portugal.

Over the past decade, Le Petit Marseillais has expanded into new categories: from bar soaps to shower gels, hair care and deodorants. Its robust presence in the Mediterranean sees it move 10 places up the European ranking this year, growing its CRPs by 10.5% and recruiting one million new households.

SUNSILK: A LESSON IN CORE AND FLEX

While it beautifully adapts to different markets and demographics, Sunsilk's core brand mission – "to help women all over the world get hair on their side" – stays true the world over.

It has shown that global ambitions can work successfully with very local execution. Sunsilk is the fastest growing global FMCG brand in 2015. But two thirds of the brand's CRPs come from just five countries — India, Philippines, Bangladesh, Indonesia and Brazil. In Asia alone the brand attracted 22m new households.

The lighthearted 'language of hair' campaign in Vietnam showed women what their secret body language might be saying to others when they played with their hair.

Brazil is the brand's biggest non-Asian market where Natural Recharge's packaging could be exchanged for mobile phone credits. In Argentina, the brand was re-launched and rejuvenated targeting a younger consumer with celebrity endorsement from Lali Esposito and a strong digital campaign.

DANA ANDERSON

SVP and Chief Marketing Officer Mondelez International

What is your view on how brands grow?
First, there has to be incredible focus across the business, leaving no room to be distracted by anything that can act against your purpose. At Mondelez, for example, our focus is on our snacking portfolio. That's the centrepiece. We know the size of the market and how fast it's growing, the margins it carries, and how consumers feel about it.

The second challenge is to become organised for growth. We've changed our organisation considerably in this regard: we have a working structure which allows for it.

A fact-based foundation for your movement is the third growth imperative. We started this process with a decision about must-win markets and brands and matching them up like a giant board. We decided where and to what we are going to pay attention.

The final element is a specific belief in how growth happens. It's not just about everyone working harder: businesses need a point of view and metrics to measure it.

For me, last year, the Brand Footprint document and the conversations

Know your purpose – that's what I think will drive success.

that we had afterwards were really revealing. When you can take a different perspective on a problem you've had for a while or a circumstance, it really can be freeing in many ways.

Our focus is firmly on increasing penetration, being mentally and physically available and creating distinctive assets. That's our approach to growth.

What has been your biggest brand building success in 2015?
There are many examples, but one of them has to be Oreo – a huge, iconic brand for us. In 2014 we launched a new thinner sandwich cookie called Oreo Thins in China.

What's interesting is that Oreo is one of those snacks where you would think it impossible to improve on the original. But people love Oreo Thins. The shape, the change in how you could eat your Oreo drove penetration by tapping into new usage occasions but we also recruited shoppers who wanted smaller amounts, or maybe didn't want so many calories.

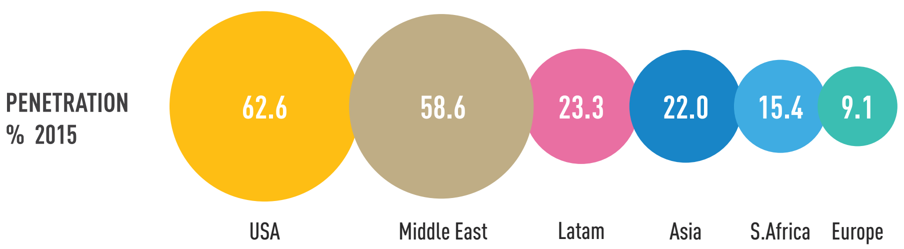
How do you explain the shifting consumer landscape and how do you think it will evolve in the coming years?
At Mondelez, we call it the 'new fluidity'. There's an abundance of choices. We have a freedom to move between these choices with ease. Boundaries are disappearing, either real, space, time, geography, social, and we have more acceptable solutions to a broader spectrum of problems.

Those are contributing factors, but the greatest disrupter was the miniaturisation of technology. My mobility and my ability to create my own fluidity have increased because of that. That's the biggest change in how people make decisions, how they seek out their own solutions, and our need to understand that, respect that.

How does a company like Mondelez respond to those kind of phenomena?
Instead of looking at it by 'look at how much I lost', I think the idea is 'look how much I can gain as a marketer', because the new fluidity also works for us.

What do you think will define brand success in the future?
At Mondelez, we have a mantra attached to each brand; it's nicknamed the luggage tag. It has four little pictures and a sentence, summarising how each product gets to its purpose. So knowing your purpose, knowing why are you here. That's what I think will drive success.

OREO: THE WORLD´S MOST CHOSEN BISCUIT



Source: Kantar Worldpanel 2015. USA by IRI. South Africa by GFK.

Brand Leaders Speak

JOANITA MAESTRI KAROLESKI

President, JBS FOODS

JBS Foods is the most recently-launched division of Brazil-based global meat processing giant JBS S.A. The latter is the world's largest exporter of animal protein, selling meat to more than 150 countries. A major player in South America and overseas, JBS controls a number of meat and food products stamped with an array of brands.

The business unit was created by parent JBS to house recent acquisition Seara — Brazil's largest exporter of chicken, and a processor of many other meat products, spanning burgers, hams and ready-meals.

What makes JBS unique as a business?
Our first strength is our culture of maintaining a high performance team, with sense of urgency, ownership and a focus on results. All of our businesses are very focused on quality — quality of products, of service, and of the relationship with the customers.

We are always looking for ways to increase operational efficiencies, looking for synergies, particularly because we have a growing organisation. In addition, we are investing in the innovation side too, looking for new technology and alternative products to meet the consumers' needs.

What is your strategy for growth?

Our challenge is to grow in Brazil, increasing our product distribution reaching new consumers, especially consumers from the countryside, and investing to build strong brands. But we are also working on growing the international market. We have space to improve our business in Asia, where we already have a presence, but we believe that we can evolve more, going beyond this region, reaching the retail market directly, and exploring new segments.

What's been your biggest success in 2015?
We have invested a lot in quality and innovation, and the consumers are with us now. We are constantly improving our operational excellence at a service level; and in innovation, we are improving the processes of making foods. We launched more than 100 products in 2015 as we strive to meet consumer preferences.

What is your general view on how FMCG brands can grow?

The FMCG market is very complex, and I think brands need to create, to work with and meet changing consumer needs, such as creating new categories.

Retail is changing as well. I think the first reaction in this industry now is to focus on promotion and pricing strategy, especially in Brazil. But that is only one part of what a brand must do. What makes the brand grow, with profitability, is relevance and differentiation. Quality and innovation are key in this context. There's no way of growing without exceeding consumers expectations.

What consumer behaviour has surprised you in the last five years?

The increasingly health-conscious nature of consumers today. A few years ago consumers only seemed to differentiate between light, diet and vitamin-add products.

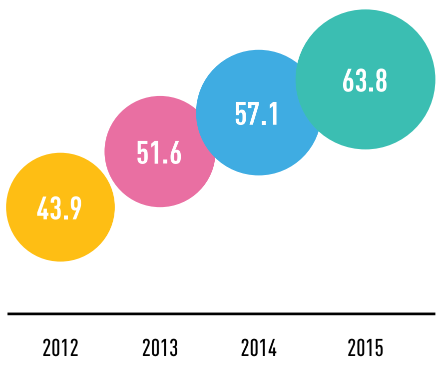
What we see nowadays is that consumers are able to describe a product's attributes, like whether it's low sodium, gluten-free, lactose-free, or how many protein and carbs it contains. This trend has become much stronger over the past five years, driving our industry to seek out alternative products that offer these benefits or attributes. We need to do that without compromising flavour and price.

What do you see happening to the FMCG market over the next five years?
There will be further advances in technology, we will have consumers that are even more conscious about health and brand owners will have to increasingly take into account the environment. Consumers will demand even more quality from the industry and from brands. Brands will need to listen to their consumers, and to innovate and align their strategies to meet those demands.

Digital media growth will continue, and the brands will need to diversify investments to creatively develop new ways to engage with consumers.

Another area that's very important is to focus on e-commerce. There are many segments, especially among FMCG, that are currently not available through this channel, and in Brazil, we don't have a large take-up of it yet. But it is growing.

SEARA WON 12M BRAZILIAN HOUSEHOLDS IN THE PAST 4 YEARS

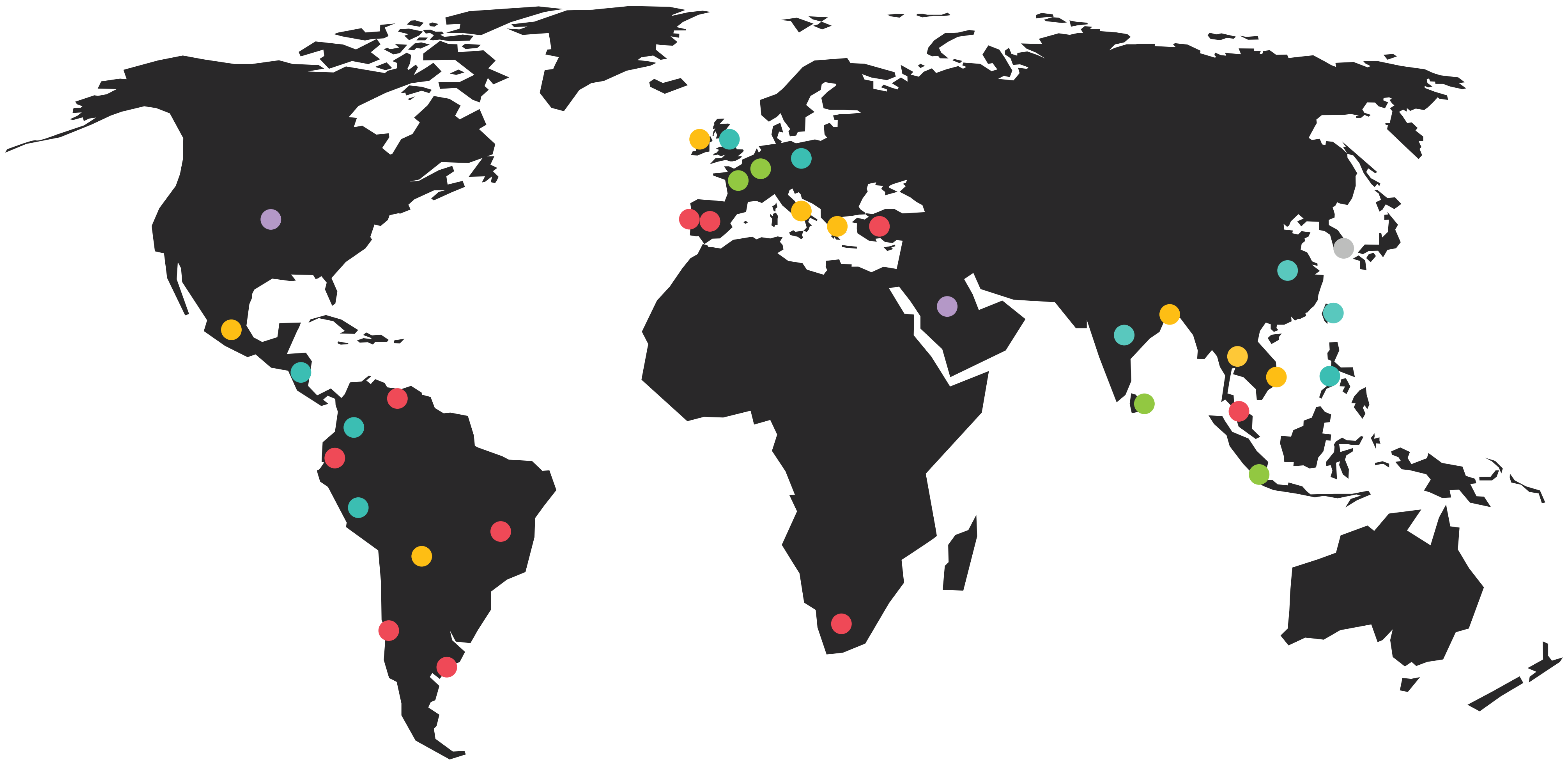


Source: Kantar Worldpanel Brazil 2015.

Number 1 Brand by Country

These are the most chosen FMCG brands in countries around the world, each revealing a small insight into both the social mores and the brand savvy which contributed to their success.

CRP GROWTH: +3% | 1 to 3% | 0% | up to -4% | -4% onwards | N/A



AMERICAS

Argentina		-4% onwards
Bolivia	Pil	up to -4%
Brazil	Coca-Cola	-4% onwards
Central America	Coca-Cola	+3%
Chile	Coca-Cola	-4% onwards
Colombia	Colanta	+3%
Ecuador	Coca-Cola	-4% onwards
Mexico	Coca-Cola	up to -4%
Peru	Gloria	+3%
USA	Coca-Cola	0%
Venezuela	Coca-Cola	-4% onwards

EUROPE

France	Herta	1 to 3%
Germany	Dr.Oetker	1 to 3%
Greece	NOYNOY	up to -4%
Ireland		up to -4%
Italy		up to -4%
Poland		+3%
Portugal	Mimosa	-4% onwards
Spain	Coca-Cola	-4% onwards
Turkey	Coca-Cola	-4% onwards
UK	Warburtons	+3%

BUILDING CONSUMER TRUST THROUGH INNOVATION

It is no surprise that the majority of brands seen on this map are local champions, developing products which effectively identify and celebrate the cultural appetite of the people buying them.

2015 saw home-grown brands Colanta and Yili rise to the number one spots in Colombia and China, fending off other beloved local brands.

Growing its CRPs by 5% in 2015, Chinese dairy brand Yili is a masterclass in innovative thinking from the boardroom to the billboard. Its chairman, Pan Gang, led the management team on a tour around Europe to visit Yili's multinational peers, trade bodies and academic groups.

Together, they challenged their own creative techniques and exchanged ideas around corporate culture, precision management and food safety, in a global context.

Meanwhile, its marketing department leveraged the brand's extensive portfolio to build mental availability and drive growth. The premium UHT brand, Milk Satine, registered growth following a nationwide marketing campaign which used popular Chinese singer, songwriter and actress Wang Faye as the brand ambassador.

QQ Star, Yili's flavoured milk drink sponsored the reality television show Dad! Where are we going? popular among its target audience: children and parents. This resulted in an impressive 14% value growth for the brand.

Driven by fresh thinking at the top and brilliant execution on the ground, Yili retained its solid reputation among Chinese consumers and rose to the top of the country ranking for the first time. Yili boasts exceptional rates of penetration (88.5%) which means that it is bought by nine out of 10 Chinese urban households.

ASIA

Bangladesh	Lux	up to -4%
China		+3%
India	Parle	+3%
Indonesia		1 to 3%
Philippines	Lucky Me	+3%
Malaysia	Maggi	-4% onwards
South Korea	Dong Won	N/A
Sri Lanka	Munchee	1 to 3%
Taiwan		+3%
Thailand		up to -4%
Vietnam		up to -4%

AFRICA & MIDDLE EAST

Saudi Arabia		0%
South Africa	Coca-Cola	-4% onwards

China's new number one brand Yili is bought by nine out of 10 Chinese urban households

Channel Hopping

Successful local brands have a head start in understanding how their consumers shop. Local culture, lifestyles, history and infrastructure shape the retail landscape and shopping habits.

Global and regional brands have to work even harder at executing shopper plans in a local way that resonates with retail customers and consumers. From French supermarkets growing mushrooms in store, to cotton candy sellers going door to door in Egypt, the way we shop for FMCG hugely varies across the globe. However, consumers the world over share one demand: convenience.

PHYSICAL CONVENIENCE

Ease of access is always top of the list when it comes to choosing a store: 79% of Chinese shoppers prefer a store close to home, while half of British shoppers cite location as key reason for choosing their supermarket, well ahead of price and range. Not all consumers interact with brands through supermarkets. In the Philippines and Thailand so called 'modern trade' accounts for only 30% of sales, compared to around 80% in Western Europe.

> E-commerce FMCG sales increased by 15% globally in 2015

Coca-Cola famously pioneered with its aim to be 'within an arm's reach of desire'. Especially in markets where modern trade is not well developed, brands are finding innovative ways to take the product out to the consumer. Mobile coffee stalls have become a common sight across Africa. The 'Yakult Ladies' show the strength of a direct distribution network: a dedicated workforce of mainly women, who fulfil the dual role of being brand ambassadors and physically delivering the product.

TECHNOLOGICAL CONVENIENCE

New developments are helping remove friction on the path to purchase. Mobile accessibility is changing how shoppers interact with e-commerce, and using a phone or tablet is becoming the normal way of shopping online. By 2018 it is projected that 71% of global internet users will be using a smartphone.

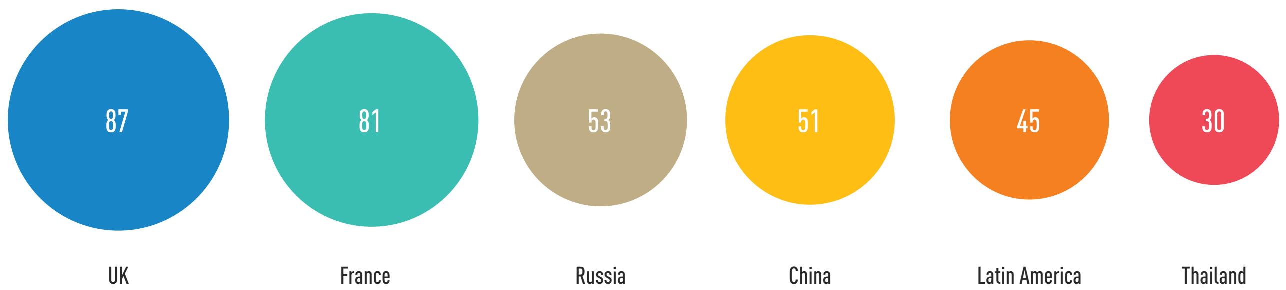
Whether accessed through mobile or more traditional computers, e-commerce FMCG sales continue to grow strongly, up by 15% globally in 2015. South Koreans still lead the way, buying 13.7% of their groceries online. "Perhaps surprising is how the take up of e-commerce doesn't necessarily follow the national take-up of technologies such as broadband" observes Stéphane Roger, Global Shopper & Retail Director, Kantar Worlpanel. "While the French and British have embraced online shopping, it has yet to make a serious impact in the United States". Latin America and large parts of Asia need to address issues of infrastructure and geography before e-commerce can thrive. Despite these challenges, e-commerce is projected to command a global 9% share of FMCG sales by 2025.

Cashless payment is changing the way shoppers buy products globally. Apple Pay, M-Pesa and contactless cards make purchasing items quicker for shoppers and cheaper for retailers. The mobile phone-based platform, M-Pesa, has seen huge success in Kenya, spanning both wealthy and developing communities, making FMCG purchasing more accessible.

Converting the virtual transaction into the physical product in the consumer's hand has presented both an opportunity and a serious challenge for online retail. The challenge comes from the high cost of picking and delivery, potentially wiping out any retailer margin.

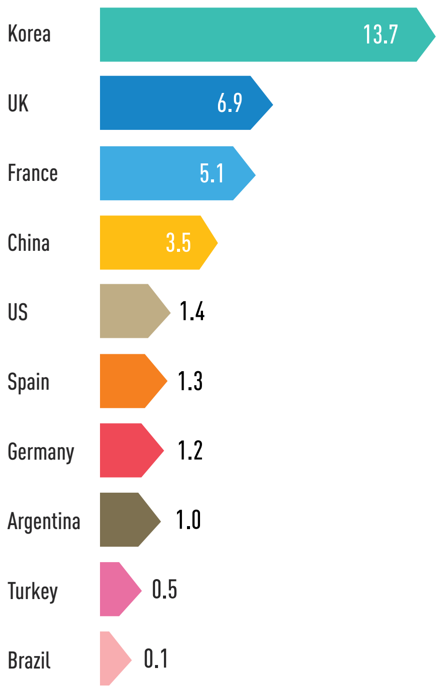
French retailers have had success in mitigating some of these costs and growing the online channel through the 'drive' model, where shoppers come to the store to pick up their pre-ordered baskets. Amazon clearly see an opportunity, rolling out same day delivery options in the UK. While not necessarily cheap, quick delivery brings more missions, such as 'dinner for tonight' into the e-commerce realm. It remains to be seen if feverish speculation around the use of drones for home delivery soon turns into a reality or remains a science fiction.

MODERN TRADE VALUE SHARE %



Source: Kantar Worldpanel & GFK – 2015 – FMCG

% FMCG SALES ONLINE



Source Kantar: Worldpanel & GFK | 2015 | FMCG | e-commerce

IN STORE CONVENIENCE

Discount retailers have thrived, particularly in Europe in recent years, opening more stores has increased their physical availability and made them more convenient for more people. Phil Dorsett, Expert Solutions Director UK, observes: "As purse strings tighten, budget-conscious shoppers in Europe are continuing to turn to discounters for their FMCG needs. Aldi and Lidl in the UK now account for 10% of the market: that's twice as much as three years ago."

Some observers attribute the discounters' success in part to having smaller product ranges. Faced with an overwhelming number of options on supermarket shelves, it has been suggested that limited choice actually acts as a magnet for shoppers. One reaction has been for mainstream retailers to streamline ranges. In 2015, Tesco shocked the market when it announced it would no longer stock beer brand Carlsberg to reduce the number of beer brands on its shelves.

However, as the big retailers reduce lines, discounters may well consider introducing more branded and premium own label items to widen appeal and avoid a growth plateau. In the UK, only 10% of lines in discounters are brands, however in Germany, where discounters possess around a quarter of the market, these stores are around 30% branded.

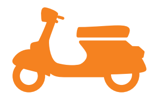
The ultimate inconvenience for a shopper is the retailer being closed, a problem that has disappeared in one Swedish supermarket. Open 24 hours a day, 7 days a week the store has no staff, and is completely self-service for pre-registered shoppers. Barcode scanning is used to both enter the store and select items for purchase.

CONVENIENCE IN ALL FORMS IS KING

Shoppers demand convenience of use in the products they buy, and also how they buy them. Not just convenience stores, though physical location and proximity retains its importance.

Technology is clearly lubricating the path to purchase, and successful manufacturers and retailers are collaborating to use technology and address the consumer's ongoing need for convenience in all its guises.

MEANS OF TRANSPORTATION



Motorbike
96%
Vietnam

Car
86%
Spain

PURCHASE TRIPS PER YEAR

Argentina
100

Peru
304

INTERNET ACCESS AT HOME

3%
India

94%
Mexico

PRIVATE LABEL SHARE%

0.6%

Brazil

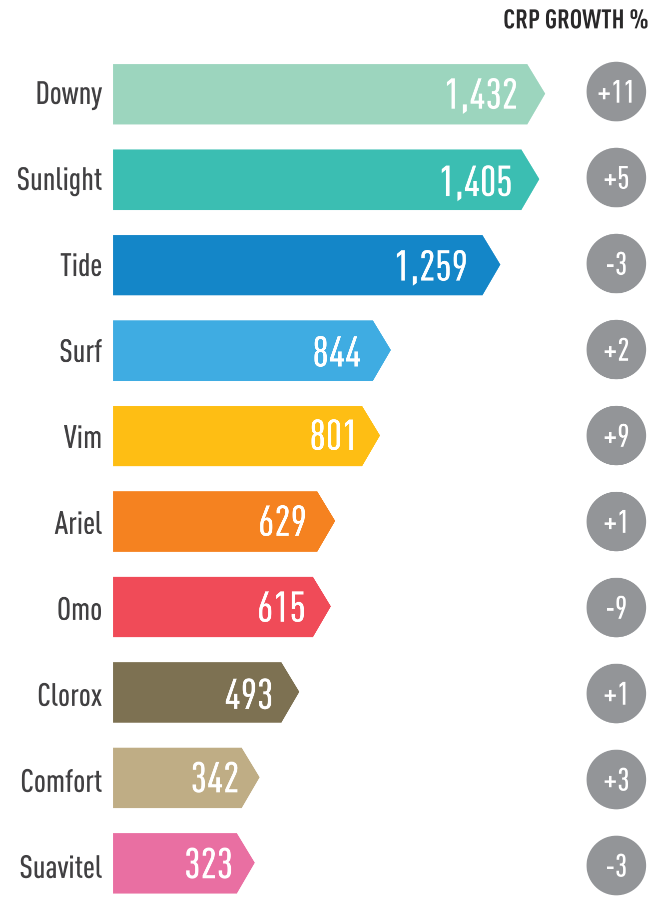
48%

UK

Source: Kantar Worldpanel – Family Form 2015 – FMCG

In Focus: Home Care

TOP 10 HOME CARE BRANDS GLOBALLY BY CRP



Source: Kantar Worldpanel 2015 - CRP in millions

The sheer number of laundry cycles and cleaning rituals across the world means the average household can expect to interact with the home care category more than 300 times in a year.

Because home really is where the heart is, consumers emotionally connect with the category in their own very personal space. The journey through life offers many opportunities for brands to make profound connections with consumers. Moving into a new home, increasing living space, having children, and looking after grandchildren are life-changing events and mean new home care needs and a wider repertoire of products.

In emerging markets, gaining access to running water means household chores are approached in new ways. Unilever in particular has responded to the challenges faced by time-poor working women, especially in countries experiencing rapid urbanisation.

A CATEGORY OF PARENTS

The arrival of children changes everything. A couple that does laundry twice a week to have their clothes soft and smelling good, will find their priorities and routines changed overnight. Parents, now making an average of four weekly washes, choose brands with bigger pack sizes and look for messages on stain removal, sensitive skin and anti-bacterial properties.

Domestos is a master of the latter and last year paired with UNICEF to promise 'no more sick days'; a global drive to facilitate toilet access, ultimately reducing the number of sick days in schools. This campaign, founded in social purpose, helped the brand enter 2m new households in 2015.

While not only aimed at mothers, P&G's EverydayMe lifestyle website connects globally with women through local content. Home care is wrapped up with personal care, food and family issues into a holistic lifestyle guide

AUTOMATION AND THE SERVICE ECONOMY

Long-term trends observed in Europe and the USA, such as the transformation from washing powders to liquids, began reaching into Latin America and parts of Asia at a rapid pace. Growth of these new formats was carried by a broader swing towards premiumisation in those regions.

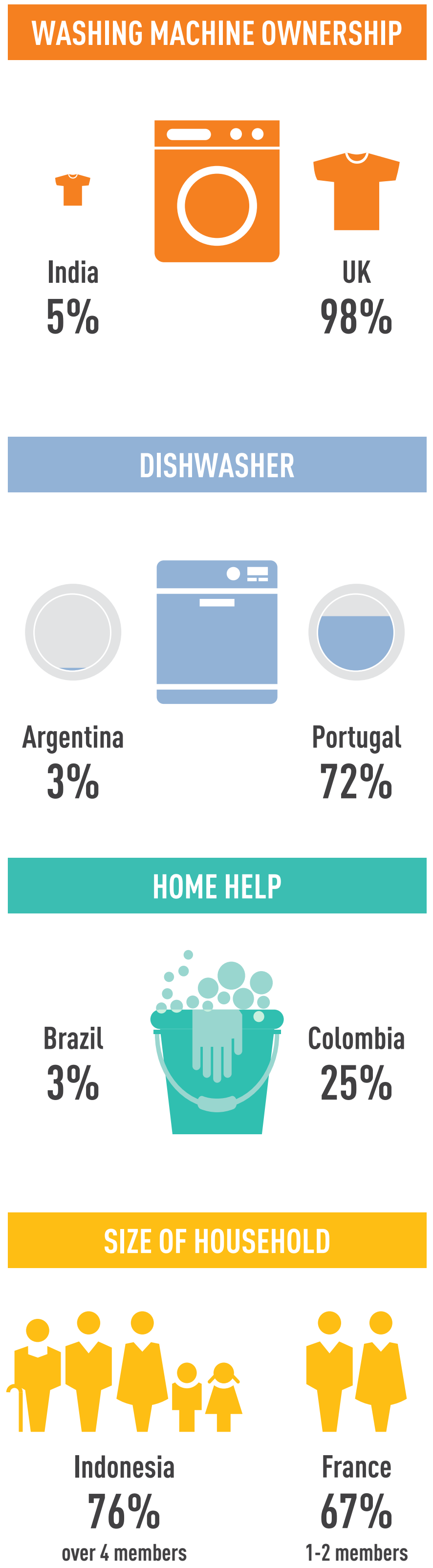
Sixty per cent of the world population still washes clothes manually – peaking in India at 92% – often using bar soap and other products that no longer exist in the West. Household access to washing machines is becoming more prevalent globally but stark contrasts remain. In Kenya and India, between 2% and 3% of the population have automated washing machines; among Brazilian and Mexican households this rises to 62% and 71% respectively.

For developed nations such as South Korea, the UK, Spain and Portugal, a minimum of 9 in 10 households use washing machines as part of their laundry regime. In some of these countries, this looks set to evolve further. There is a small but growing interest in external services: at some London Underground stations, commuters can drop off laundry and have it returned clean and ironed within 24 hours.

CHANGING RESPONSIBILITIES

Another prominent social shift facing home care marketers is a continued increase in women working outside the home. This does not always positively correlate with men assuming more responsibility for household chores; rather, less time often dedicated to the home overall.

Ariel's Share the Load campaign in India last year encouraged men to become more active in housekeeping responsibilities. This saw the brand grow its CRPs by 7.7% in Asia.



Source: Kantar Woldpanel – Family Form 2015 – Penetration%

MULTI-BENEFIT

"Manufacturers are broadening their range of products by folding brands within their existing portfolio together to provide an additional benefit," says Simon Skeldon, Global Account Director Kantar Worldpanel.

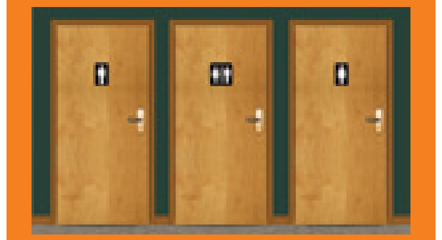
In the UK, P&G launched the 'Clean and Care' range. Combining two strong products – skincare brand Olay and home care stalwart, Fairy – a new amalgamated category is created: clean dishes and softer hands.

THE FUTURE

Identifying and aiding real human problems represents an opportunity for those in the home care category.

Winning brands are already making strides in understanding the person behind the purchase. In 2015, Unilever's Sunlight partnered with social enterprise NextDrop to launch a branded text service in Mysore, India, alerting women to when water will be available, saving time for education or earning a living.

There are two factors which will determine the future of home care, agrees Simon Skeldon: "sustainability and water. The more access to water, the more complex and sophisticated our cleaning can be. This will impact the way products are made across the globe."



BRAND STORY – HARPIC

Few brands can claim a stronger commitment to social responsibility than RB's Harpic. For the past four years, it has been in partnership with Save the Children in India to address water sanitation issues and use the brand to raise awareness about good hygiene practices.

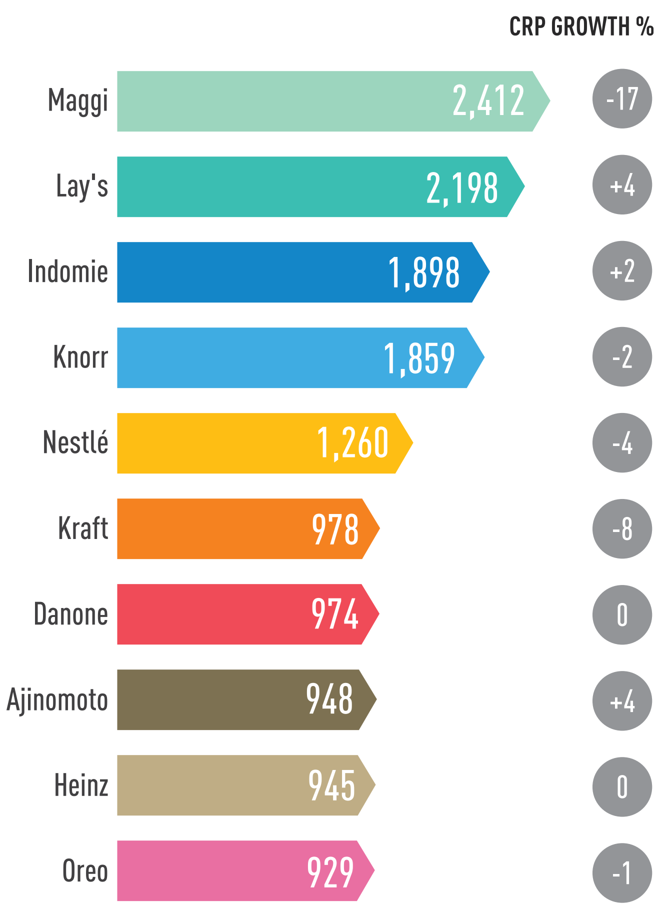
The initiative – Hope with Harpic – was founded in response to the 2011 census of India. It showed that 53% of the country's households have no toilet, contributing to waterborne disease and death, particularly among children.

In November last year, in partnership with Dettol and the World Toilet Organisation, Harpic announced the opening of the first World Toilet College in Rishikesh in March 2016. The college will teach students the skills needed to design and build toilets, and is primarily aimed at young people.

In the past year alone, the Hope with Harpic initiative has seen the brand grow its CRPs by 27.6% in one of the world's biggest markets, boosting its position in the Indian ranking by 13 places.

In Focus: Food

TOP 10 FOOD BRANDS GLOBALLY BY CRP



Source: Kantar Worldpanel 2015 - CRP in millions

Across the world, consumer attitudes towards food are changing, albeit at different paces and sometimes in different directions.

This is what Alison Martin, Director at Kantar Worldpanel, calls the fragmentation of consumer demand. "In Western markets, consumers are demanding products tailored to increasingly specific needs; be that free-from products, non-traditional flavours or new formats. The advantages of scale afforded to the multinationals have become eroded as smaller players adapt to changing tastes faster than the giants."

"In developing markets," Martin continues, "fragmentation is less about product than about regional dynamics. China, for example, is growing at a faster rate than many markets but much of that growth is taking place outside big cities. With Western giants structurally suited to hitting big cities with volume and less able to distribute into the regional cities, local players are flourishing."

Indeed, while on a global level, the fastest growing brands in the food ranking include Barilla (+7% CRP), Lay's (+3.8% CRP) and Doritos (+3.7% CRP), tastes remain inherently local. Among the top 10 local FMCG players growing fastest in value, seven of them are food brands.

Giles Quick, Director of Kantar Worldpanel's usage panel in the UK, agrees that a key element for brand growth will be versatility. "The splintered shopper landscape makes for fertile ground," he says, which – if leveraged correctly – can provide an opportunity to create distinction. Personalisation and mass customisation will soon be possible with technologies like 3D printing. "When I visit a supermarket in the next few years, I will be able to have my food, my way."

Brands that offer convenience and time-saving benefits while still delivering 'homemade' flavours will win in this new environment.

THE HEALTH WAVE

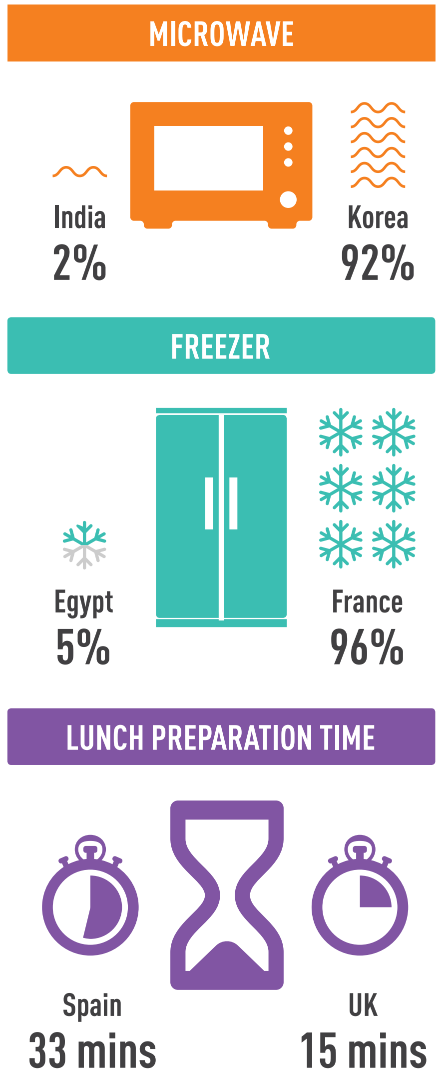
Awareness of the quality of ingredients, particularly in packaged goods, has reached an all-time high. While low-calorie variants and fresh produce reign in some Western markets, transparency and safety are watchwords across Asia, where trust in certain beloved brands has plummeted.

The moment people reach for a snack or indulge in an extravagant meal, more and more they recognise the consequences it will have on their health. "Consumers are joining up the dots," says Quick. A third of millennials use their smartphones to track their calories against exercise. Soon the consequences of actions (like eating a particular product) will be very visible and, with it, habits will change. Thirty minutes of high intensity exercise to burn off a snack may be a greater barrier to purchase than the price.

In Europe, where the trend is at its most advanced, the growth of contrasting consumer tribes and identities is evident in the food brands winning in the ranking and in additional Kantar Worldpanel consumption data.

Pursuit of a healthy lifestyle is demonstrated by a growth in free-from ranges and low calorie alternatives. Irish food giant Kelkin's 2014 partnership with nutritionist Aveen Bannon showed parents how to prepare healthy snacks for their children.

This nutritious streak is offset by a hunger for something naughty. Swiss-born Lindt climbs three places in the global food ranking to 34.



Source: Kantar Woldpanel – Family Form – 2015 – Penetration%

In Latin America governments have wrestled with different policies to reduce obesity levels. Clearer packaging and public education is trickling down into consumer decision-making at the shelf. Mexico's sugar tax reduced sweetened beverage sales by 12% in its first year, according to the British Medical Journal. In 2015, the Brazilian government imposed strict advertising regulations, limiting brands' rights to advertise unhealthy foods to children. A similar sugar levy in the UK is imminent.

HOW WE EAT, HOW WE BUY

Brands that are focusing on new dishes and new occasions in the kitchen understand that growth potential is larger under a usage lens. Dairy brands have been successful at this, adds Quick. "By segmenting their category by use, you have yoghurt for breakfast, yoghurt for lunch boxes, natural yoghurt for cooking. I can choose diet pots. There are products for every occasion."

FREE FROM: THE VEGGIE WURST

The growth of free-from ranges in many countries presents a masterclass in both targeting new shoppers and expanding across categories. These products command and secure a higher price point targeting health and environmentally conscious consumers who are willing to pay more.

Even Germans, long noted for their carnivorous diet, are increasingly choosing meat-free options as sustainability becomes an important influence on their choices. Cold meat producer Rügenwalder, for example, launched a vegetarian range in 2015 to great success.

With one of the highest incidence of coeliac disease in the world, Ireland is seeing free-from variants develop fast. Retailers have consequently bestowed the category more shelf space and many surprising brands have jumped aboard. Goodfella's in particular has seen growth of 10.4% CRPs in 2015 since the introduction of its gluten-free pizza range.

Gluten-free ranges mark a strategic addition to the pasta category overall. Barilla's aim is to target customers leading a gluten-free lifestyle, who may have previously avoided pasta due to negative taste perceptions, high prices and limited availability.

BRAND STORY – BARILLA

2015 was a big year for pasta brand Barilla: it entered the Top 50 ranking for the first time. With its CRPs up by 6.7% globally, the Italian favourite's success saw its performance in European markets (+5.5% CRP) and Latin America, where its ranking was up 32 places.

Barilla shows that even large multinationals can behave like a convincing local. In France (currently its main export market) where provenance and quality reign, the brand launched its first line of organic pasta. Miloud Benahouda, Barilla's VP for Western Europe stated that in five years, this range could account for 10% of total sales.

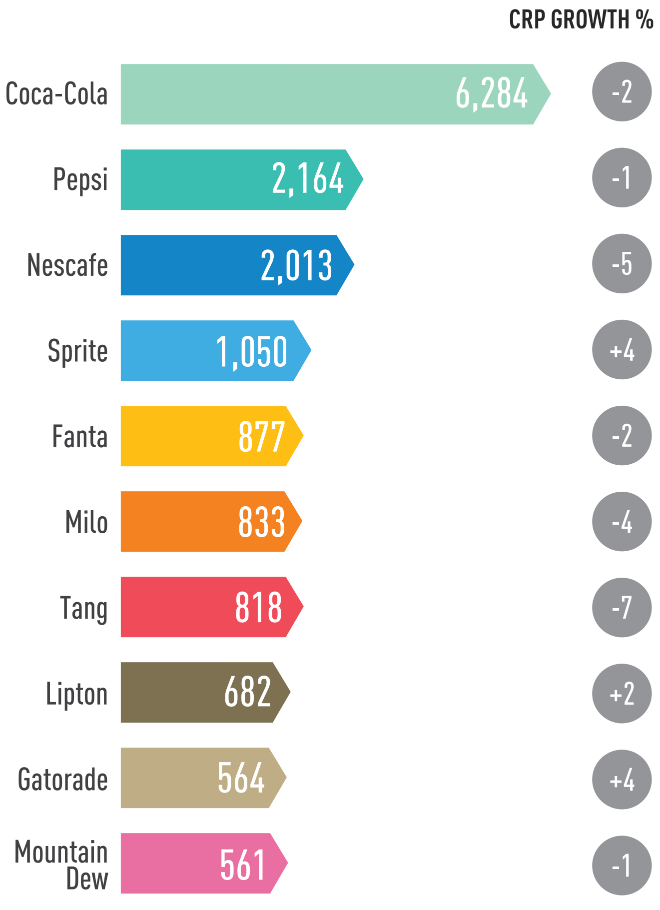
Acting on evidence that American consumers are willing to pay more for certain premium attributes such as whole grain, added nutrients and convenience, Barilla took steps to grow its margins and attract new demographics in the US.

Nationwide, the Barilla Pronto range – prepared in one pan and ready in 10 minutes – was introduced last year.

In Chicago, Barilla teamed up with online grocer Peapod to launch pasta meal kits delivered direct to door. These campaigns grew the brand's CRPs by 3.1% in the large US market.

In Focus: Beverages

TOP 10 BEVERAGE BRANDS GLOBALLY BY CRP



Source: Kantar Worldpanel 2015 - CRP in millions

Coca-Cola remains the market leader, reaching 46% of the world's population. It's been a good year for Red Bull (Position 96, growing CRPs by 8%). Sprite is the fastest growing brand in the top 10.

BITTERSWEET

Previously quiet concerns about overall sugar consumption, and soft drinks' contribution to sugar in the diet took to centre stage. Fruit juice was hardest hit, with carbonates also losing favour with consumers. The UK's largest retailer Tesco pledged to reduce the sugar content of own label soft drinks by 5% a year, and remove from sale children's juice drinks with added sugar. The UK government will be imposing a sugar tax on soft drinks in 2018 joining Mexico, France, Finland, Hungary and Poland in an attempt to reduce sugar consumption.

Soft drink brands wanting to grow have duly noted the triple threat from changed consumer awareness about sugar, retailer listing policies and government action and have responded in a number of ways.

One strategy has been to place more emphasis on no calorie variants. In 2015 Red Bull launched their Zero Calories sub-brand, particularly looking to appeal to the health conscious millennial generation. Rival brand Monster energy has followed a similar strategy, with the zero sugar, zero calorie 'Ultra' variant.

Another option is for brands to offer some positive health benefits as well as keeping an eye on sugar levels. Yakult have found success in China through the lower calorie 'blue cap' version of the yoghurt drink, while also offering consumers the chance to increase calcium intake. The Tropicana Essentials range mixes fruit juice with vegetables giving enhanced levels of vitamins and fibre. Innocent, for a long time a byword for fruit smoothies, has embraced vegetable drinks as well as launching into coconut water.

AS CLEAR AS WATER

Around the world 1 in 10 people still lack access to safe water, according to water.org. Drinking water brands whether bottled or in a dispenser format offer at least a partial solution for some of the problems brought about by the lack of running water and adequate sanitation.

Meanwhile mineral water brands are thriving in developed markets, partly as consumers turn away from sugary drinks. The largest water brands are all growing CRP, Volvic +9%, Perrier +10% and Pure Life +4%.

Even in its European heartland, Volvic commands only 8.4% penetration. The enhanced water market, such as Volvic's Touch of Fruit sub-brand, looks to capture consumers moving away from juice and carbonates but still looking for flavour. These waters are a hit with children and health-conscious young women, reaching out to shoppers who wouldn't want plain water all of the time. The lines are blurring between water and juice drinks. Looking to grow by expanding across categories, Volvic Juicy extends the brand from core mineral water.

NEW WAYS TO THINK ABOUT DRINK

Beverage packaging lends itself well to innovation. Tapping into ever busier lives and increased consumer awareness of hydration levels, mineral water brand Vittel debuted a bottle cap with a built-in timer. Every hour, the cap raises a flag alerting the consumer to drink some more water.

Coca-Cola is now helping to export connections for those away from their family. Under the 'Hello Happiness' banner Coca-Cola in Dubai turned used bottle caps into currency. In a specially constructed phone booth, migrant workers could phone home by inserting a bottle cap as payment for the call.

SOFT DRINKS SPEND IN HOME VS OUT OF HOME

IN		OUT
63%	Brazil	37%
57%	China	43%
54%	UK	46%
48%	Mexico	52%
31%	Spain	69%

SPEND PER OCCASION ON PREMISES

China	Spain
0.4 USD	4 USD

AVERAGE PRICE PAID PER CUP OF COFFEE (UK)

In Home	Out of Home
0.07 USD	2.56 USD

Source: Kantar Worldpanel – 2015 – Out of Home – Individual responses

DRINKING OUT OF THE HOME

Café, bar and other out of home outlets serve up important innovations that later end up in the take home channel. Still small in supermarkets, but growing CRP rapidly (+19%) is the Starbucks brand, the ultimate out of home franchise moving to target new occasions in the take home channel.

In many countries, out of home consumption is growing ahead of static take home sales. In the UK, coffee shop sales are up by 6% in a year; even supermarkets have boosted out of home sales by 4%. Spanish consumers reduced OOH during the recession but are now returning, although mainly at the weekend.

Consumption of out the home varies widely around the globe due to cultural differences. Purchases can be made through vending machines, ice cream parlours, drinks trolleys, leisure venues, all according to local taste and custom.

Maria Josep Martínez, Global Director OOH & Usage Food said: "Why does a person buy an energy drink at 6am? If brands understand who, what, when, where, why and how people are eating and drinking every day, they can use this to develop an advantage with both consumers and retailers. Finding and exploiting these 'demand spaces' is the key to driving successful innovation in product development and distribution to grow brands".

BRAND STORY – SPRITE

Sprite found an additional 15.9m shoppers in 2015, with overall CRP rising by 3.9%.

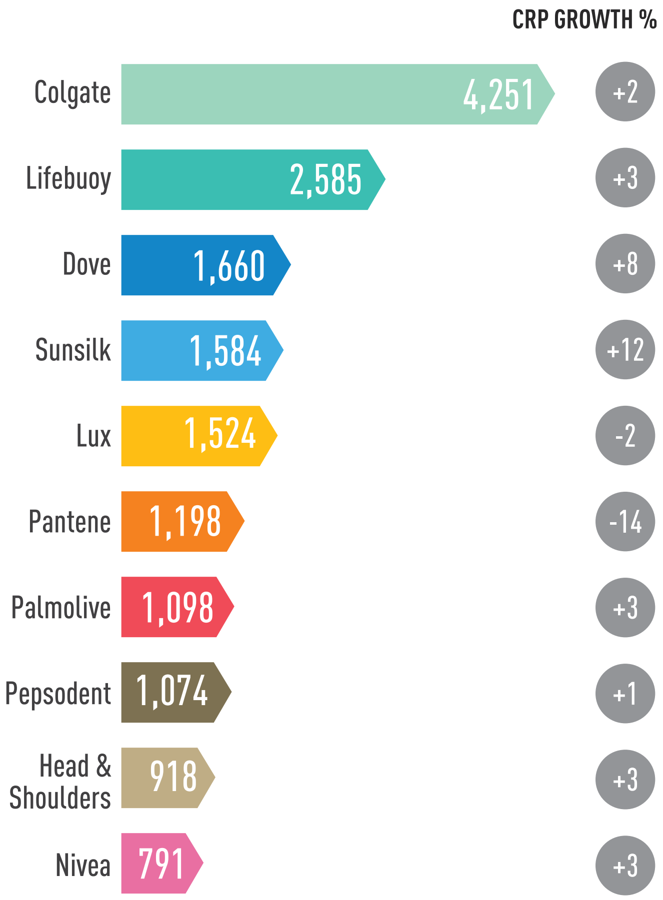
The US remains the single biggest market for the brand, and still one of the growth drivers. Sprite has a long association with hip-hop music, using rappers in 1980s television commercials. Today, hip-hop is in the American cultural mainstream, as shown by 16 limited edition Sprite cans quoting lyrics from some of the musical genre's most admired artists.

Sprite's 5th largest market, India, has seen a different kind of innovation. Sprite Zero, the low calorie variant has been exclusively tested on the e-commerce mobile app Grofers rather than the usual route of modern trade outlets. The brand only reaches 8% of Indian consumers, leaving plenty of head room for growth in future years building on the 2015 CRP increase of 18%.

In Brazil, Sprite has turned cans into communication touchpoints. Snapcodes printed on packaging invite consumers to connect via Snapchat to a set of 15 Generation Z influencers. The selected singers, skateboarders and artists have been carefully chosen to represent the brand values.

In Focus: Health and Beauty

TOP 10 HEALTH & BEAUTY BRANDS GLOBALLY BY CRP



Source: Kantar Worldpanel 2015 - CRP in millions

Health and beauty is top of the FMCG category class, with eight out of the top 10 health and beauty brands growing their CRPs this year.

Unlike in food, where local tastes demand locally tailored products, the very biggest manufacturers such as Colgate-Palmolive, Unilever and Procter & Gamble are successfully growing their brands in local markets across the globe.

These big brands are exploiting the available penetration headroom, so even Colgate, the brand chosen globally by the most people, has managed to find another 40 million buying households. On average, the rest of the top 10 are only reaching 25% of the world population.

Brands have helped entire populations raise everyday hygiene standards, and offer rising middle classes affordable luxury.

EMBRACING TECHNOLOGY

Consumers see no contradiction in wanting beauty products pure and natural as they simultaneously embrace technology.

L'Oréal's Makeup Genius applies bronzer, eye shadow, lip gloss and eyeliner in real time using facial recognition technology. The app scans your face and then allows you to try different products or entire make up looks. You can then share your selfie and purchase the products directly through the app.

In China and elsewhere the Clarasonic electronic revolving brush system promised to effectively remove make up, deep cleanse skin and, pointedly, remove the pollution that comes from living in a modern industrial world. Clarasonic creates a new, or at least enhanced category beyond the old manual make-up removal method, learning from previous electric toothbrush and shaving innovations.

Colgate introduced more technology and innovation to the market this year, including its power toothbrushes, which come with USB chargers and nice simple cases.

Dove wanted consumers to #loveyourcurls through the modern medium of emoticons, showcasing the huge variety of hairstyles worn by women and girls with curly hair.

North American consumers have long been sceptical of spray deodorants and anti-perspirants, worrying about potentially messy application and the environmental impact of propellants. Axe, Degree and Dove have addressed this by launching their dry spray variants in the United States. The canisters and dispensers have been optimised to produce the smallest and driest particles as they come into contact with the skin.

Razor blade innovation has come to the women's market with Gillette Venus Swirl from P&G. The 'flexiball' on which the blades are mounted can rotate in multiple directions, giving a smoother shave around knees and ankles.

PREVENTION IS KEY

Repairing damage and maintaining wellness have been joined by prevention as a major health and beauty trend, with brands launching anti-pollution creams, and make-up and skincare with inbuilt UV protection.

Nivea used UV-sensitive dolls in Brazil to show parents and children how important it is to apply sunblock. The dolls went red when exposed to too much sun, illustrating the danger of UV rays, even at times when the average consumer might not think that an SPF cream was needed.

Zendium toothpaste uses enzymes and proteins to boost the mouth's natural defences, rather than relying on additional chemicals. Unilever acquired Zendium brand back in 2010, rolling out from its Northern European strongholds into France last year, and then to the Middle East.

Source: Kantar Worldpanel & GFK Usage insights – Individual responses – 2015

PROMOTING HEALTH

Lifebuoy found innovative ways to attack germs, attaching disinfecting devices to shopping trolley handles in the UAE, and making the red packets traditionally handed out to family and friends at Chinese New Year double up as usable soap.

In Indonesia, where frequent flooding presents sudden hygiene risks, Lifebuoy created a warning system providing mobile alerts and reminding people to wash hands thoroughly.

Attempting to export a cultural norm, Colgate noted 47% of the Indian population had never visited a dentist, prompting them launch 'oral health month', resulting in 5 million free dental check-ups across the nation.

Dabur Red Paste, Colgate's main competitor in the oral care market, prides itself on having the largest herbal and natural product portfolio in the world.

In 2015, Dabur Red Paste increased its penetration by 22% with a dental education initiative rolled out for children in schools across rural and urban Asia. One hundred per cent vegetarian and herbal, with no chemicals, it has continued to reach new consumers with innovative smaller packaging and by expanding into new territories.

BRAND STORY – DETTOL

Dettol is a top riser in 2015, up six places in the global ranking and enjoying 20.5% CRP growth in Asia.

It undertook a noble initiative to promote a sanitation message across the Indian market. According to the 2011 census, over 110 million households in India have no access to basic sanitation. More than half of the Indian population do not wash their hands after using the toilet.

With increasing competition in the soap and hand wash space, Dettol used these statistics to grow its category, igniting a social movement to spread awareness and bring out behavioural change about hygiene and sanitation.

During India's annual pilgrimage, volunteers distributed branded hand sanitisers, bringing a new usage occasion to the market and showing the breadth of its portfolio.

Dettol's Swachh express bus visited many small towns and over 2,000 villages across India. Innovative marketing techniques and channels such as local radio stations, leafleting and even tannoys were employed to deliver public announcements on the importance of personal sanitation country-wide.

Dettol now counts the United Nations, the Gates Foundation and several other NGOs as its partners in the fight against poor hygiene.

The Americas at a Glance

2015 was the worst year for the Latin American economy since the effects of the last global recession hit the region six years previously.

Driven primarily by poor economic conditions in Brazil, this downturn – brutally combined with steep inflation – has inevitably influenced purchase behaviour.

Bad news for the economy was good news for local brands, which largely outperformed their global competitors. Adapting to local tastes, expanding into new categories; these brands know what matters to Latin American consumers, who remain influenced by friends and family.

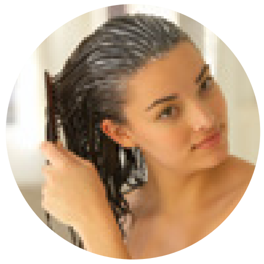
Distribution is also key: local brands have an advantage from a stronger presence in traditional trade. Bodegas, convenience stores, wholesalers and pharmacies were more popular than ever in 2015. Mexico's Vive100 meanwhile expanded into Colombia by innovating on convenience: selling energy drinks to drivers at traffic lights.

Cost-benefit is a trend gaining relevance in Latin America. Consumers are seeking specialised categories and, in order to stay in budget, compensate spend from other baskets.

TOP 5 GROWING BRANDS IN LATAM

Gloria	13
Rexona	9
Dove	8
Head & Shoulders	7
Del Valle	5

Sources: Kantar Worldpanel – 2015 – % CRP growth



MEXICO: PREMIUM FOR ALL FAMILY

Savilé was introduced in Mexico less than a decade ago and has been fast gaining recognition as the shampoo of choice for Mexican families. The all-natural aloe-based product increased its CRPs by 22% in 2015 by expanding its core product into a series of variants, while appealing to Mexican consumers' desire for sophisticated products at a low cost. The brand also tapped into local family values: its advertising campaigns last year featured mothers passing on beauty advice to their young daughters, a winning concept which extended onto product packaging.

PERU: GROWING SUCCESS FROM HOME

Local Peruvian brand Anita Food found success by innovating food production. In 2003 the brand developed its own wheat seed that not only suited the country's climate, but improved on offerings already in the market.

The 'Anita T.4 seed,' which was later recognised by the Ministry of Agriculture, was certified and heralded as one of the best six Peruvian seeds. The company has since expanded rapidly across both categories (introducing pasta and cookie ranges) and geographies. Now with a strong portfolio and a total of seven export markets, Anita Food grew its CRPs by 20% in Peru in 2015.

UNITED STATES: FRESH BUYERS

There is a growth of consumers who are now searching for fresher, more sustainably raised produce, fresh meat and seafood. Whole Foods and other niche retailers like Trader Joe's which service customers looking for personalised, more mission-oriented buying experiences are thriving. Particularly in big cities like New York, high-end private label is going from strength to strength.

BRAZIL: A FERTILE MARKET

There are certain global brands that continue to outperform both globally and locally. Dove has continued to move up the brand ranking and into consumers' hearts year after year. In 2015, it was among the top five growing brands in Latin America.

The brand's expansion across categories and demographics into products under the 'Baby Dove' banner was launched solely in Brazil last year. Continuing its celebration of 'real' people, the brand dismantled the idealistic portrayal of the perfect mother, claiming there were only 'real mothers' who want the best for their babies.

FOOD TRUCK

On a local level, home-grown meat giant, Seara grew its CRPs by 35% in 2015, climbing 16 positions in the Brazilian ranking. Last year, it was notable for the launch of the world's first 'Social Food Truck'.

The truck served exclusive dishes using the brand's products, promoting the many different meals and occasions which consumers could try at home. The cost of a meal amounted to just one social media post referencing the brand, deftly joining together an experiential campaign with increasing online conversation and advocacy.

Countries included in the ranking/ highlighted for comment

Not included in the ranking

Europe at a Glance

The prospect of a divided Europe was not limited to the political landscape in 2015. Brand Footprint data showed a highly fragmented group of shoppers, both within communities and across borders.

The European as a homogenous character is fading away. An older woman in a French hypermarket is likely to choose products with larger print and smaller, easy-to-open packs.

A British Millennial is a rare sight in supermarkets: they prefer prepared meals from smaller stores or a snack from a corner shop to eat on the go.

A young family in Russia, under pressure from rising inflation, is taking advantage of a growing discounter share and decreasing cost of private label products seen in 2015.

The continued popularity of discounters stitches together an otherwise divided continent. While the highest share is in Poland (25.3%), and the lowest at 10% in the UK, both are showing double digit growth.

TOP 5 GROWING BRANDS IN EUROPE

Pringles	7
Nutella	6
President	6
Bonduelle	6
Snickers	6

Sources: Kantar Worldpanel & GFK – 2015 – % CRP growth

GERMANY: AGAINST THE FIZZY TIDE

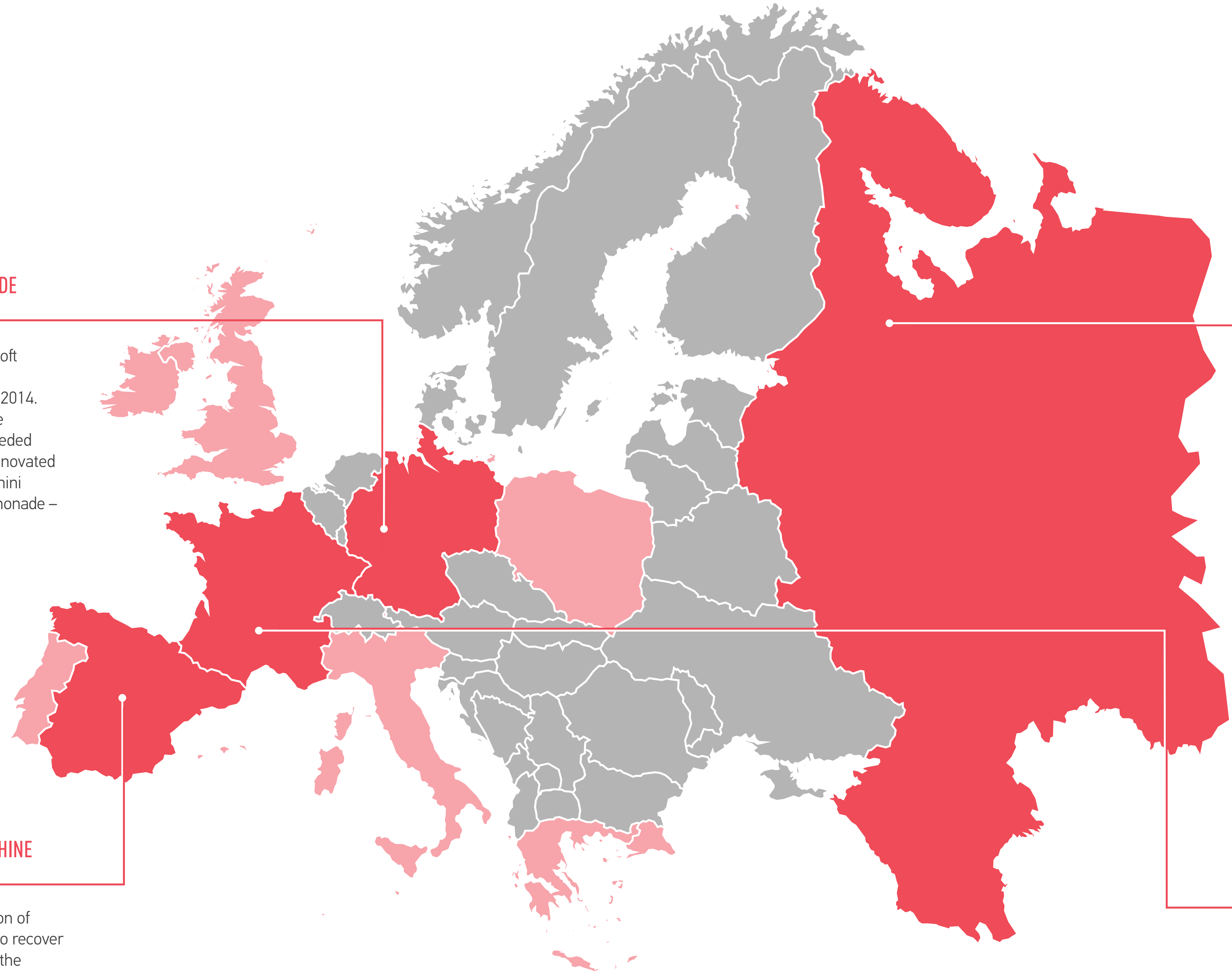
Renowned for its range of juices, soft drinks brand Granini introduced a surprising new brand extension in 2014. As many competitors, not least the Coca-Cola and PepsiCo brands, heeded consumers' sugar concerns and innovated away from carbonated drinks, Granini introduced its first – a premium lemonade – to great success.

SPAIN: SPENDING IN THE SUNSHINE

The out of home (OOH) consumption of drinks and snacks in Spain began to recover in 2015. This was mainly driven by the success of the HORECA (Hotels, Restaurants and Cafés) channel accounting for 71% of OOH expenditure.

"The hot summer was the catalyst which finally encouraged Spaniards to go out and spend, marking the end to several difficult years for the restaurant sector," says Edurne Uranga, Out of Home Director at Kantar Worldpanel Spain.

Over-50s account for almost half of OOH consumption. As such, the preferred OOH channels for younger shoppers are declining. Vending machines, ice cream shops and kiosks dropped by -1%.



Countries included in the ranking/ highlighted for comment

Not included in the ranking

Many European brands are finding their own heritage a unique selling point to global markets. Chocolatiers Lindt and Ferrero are masters of this game, both exporting their sweet treats to a growing number of overseas consumers.

RUSSIA: SQUEEZED BUDGETS

Russia's economic reliance on declining oil prices led consumer confidence to a six-year low in the first quarter of 2015. Food inflation soared to an all time high of 26.1% in February.

Shoppers tightened their belts, down-trading to a level seen only in Latin America. Discounters and private label benefited: basket size, penetration and frequency grew. Volume sales almost doubled, from 2.1% to 4.1%.

FRANCE: THE RIGHT QUALITY AT THE RIGHT PRICE

Lidl no longer wants to be just a discounter. As it moves more up-market, the retailer has introduced local produce and fresh bread to shop floors in a bid to compete with leading supermarkets. By keeping price points low, Lidl has retained its core bargain-hunter shopper, but these new products and events see it draw in a more affluent audience. Now targeting a much broader range of socioeconomic groups with the 'right price' rather than 'cheap alternatives', even its private label brand is going premium.

Africa and Middle East at a Glance

While Africa remains one of the fastest growing regions globally, growth was and average of 3.7 percent in 2015, down from 4.6 per cent in 2014.

Despite this, the GDP in the region is expected to pick up to an average of 4.4% and 4.8% in 2016 and 2017 respectively.

Poverty is abating but remains high: the majority of consumers have little spending power and many purchasing decisions on essential goods are based almost entirely on affordability. Price points and margins remain low by necessity.

Yet there are opportunities for brands. According to the World Bank, annual spending growth in Africa is expected to increase at a faster rate than it is globally. And Africans are also spending more than ever on FMCG.

Kantar Worldpanel data shows significant growth spots across the continent over the past year, particularly in Ghana (+29.4%), Kenya: (+9.3%), South Africa (+5.3%) and Nigeria (+5.2%).

TOP RISING BRANDS IN AFRICA AND MIDDLE EAST MARKETS

Kenya: Highlands	140
South Africa: Maq	77
Nigeria: Olympic	62
Saudi Arabia: Caesar	28

Sources: Kantar Worldpanel & GFK – 2015 – % CRP growth

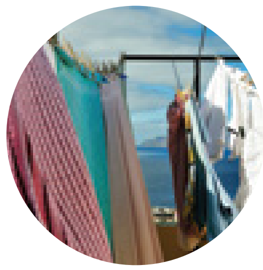
Modern trade holds a significant 54% value market share in Kenya, in comparison to 46% traditional trade

NIGERIA: LOCATION, LOCATION, LOCATION

Urbanised regions which offer a steady flow of potential customers are natural hotspots for growth. According to the UN, 17 of the 53 urban areas in Africa with a population exceeding one million people are in Nigeria alone, where total CRPs grew by 6.7% in 2015.

While smaller brands cannot afford above-the-line advertising, they find success through direct marketing, point of sale promotions, street flyers and word-of-mouth. Many are now adapting to the rise of the connected consumer and advertising online.

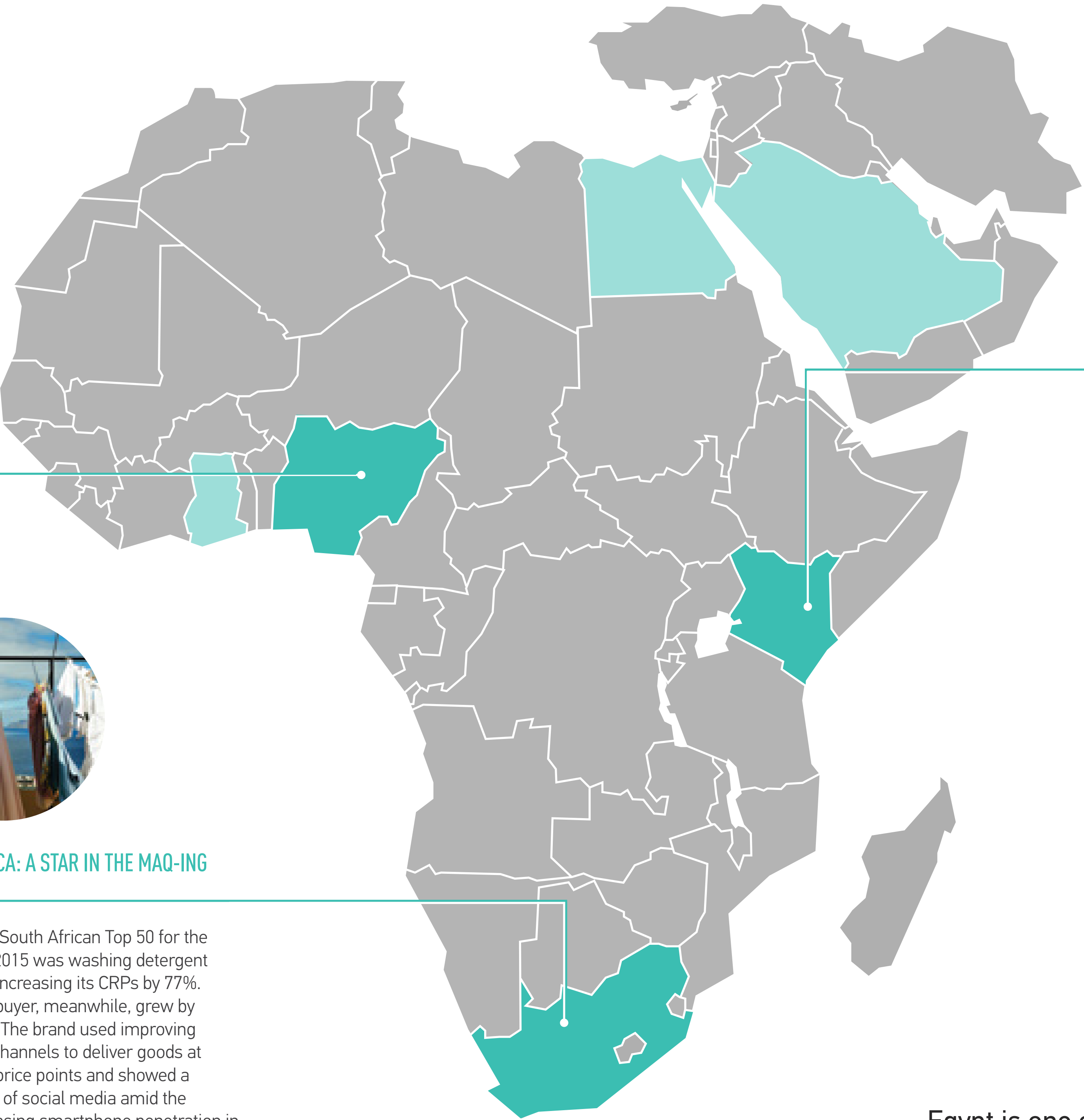
Global brands are catching up: Coca-Cola builds awareness by supplying local stores with branded fridges for its drinks, increasing both physical and mental availability. Nestle's Milo is very popular, says Augustina Umunna, Director, Kantar Worldpanel for West and Central Africa "It keeps itself front of mind with year-round promotional marketing. It gives out sports bottles for children, gifts to customers – anything that adds value."



SOUTH AFRICA: A STAR IN THE MAQ-ING

Entering the South African Top 50 for the first time in 2015 was washing detergent brand MAQ, increasing its CRPs by 77%. Volume per buyer, meanwhile, grew by almost 50%. The brand used improving distribution channels to deliver goods at competitive price points and showed a strong grasp of social media amid the rapidly increasing smartphone penetration in the country (now at over 91%).

Its campaign MAQ a Movie gave South African shoppers the chance of becoming film stars. Open auditions were held for amateur actors to test for one of five roles in a new film to be screened across South African cinemas. There was only one condition: in order to audition, entrants had to show proof of purchase for a MAQ product. This campaign cleverly engaged with shoppers, giving them the chance to, 'add colour to the story, much like MAQ washing Powder brightens up your day.'



Countries with household panels

Not included in the ranking

KENYA: THRIFTY LOCAL BRANDS SOAR

Consumers are increasingly price sensitive, especially with FMCG, and smaller brands are faster at responding to market forces. Cooking oil distributer Pwani Life identified a large market of consumers that wanted soap but could not afford it. By tapping into an unused by-product from oil production, the company created an extremely cheap soap product dubbed Sawa ('okay' in Swahili). Sales soared to 20% penetration in just over a year, driven mostly by new category buyers.

GENERATION: DETERMINED

Young Kenyans are characterised by an entrepreneurial spirit and determination to lift themselves out of poverty. Smart players should therefore diversify their portfolio across multiple price points to increase penetration, while building a strong enough brand to retain relationships with this advancing socioeconomic group.

Egypt is one of the few corners of the world where Pepsi is chosen more often than Coca-Cola.

Asia at a Glance

As the Asian market evolves and growth slows down, competition is heating up between brands to win the hearts and minds of Asian consumers. Local players are using this state of flux to their advantage, dominating the Asian market in 2015, possessing 74% of total FMCG spend and growing their sales by double that of their global competitors.

Brands that thrive in the Asian market know the importance of national culture, values and pride, and reflect this within their brand narratives.

However, they also understand the fast pace of the culture and its desire to blend old with new, tradition with technology.

By listening to consumers' desires they can innovate their offerings, putting a local twist on them and increasing the perceived value and relevance for the consumer.

TOP 5 GROWING BRANDS IN ASIA

Attack	55
Dettol	21
Kopiko	20
Good Knight	16
Downy	15

Sources: Kantar Worldpanel & IMRB – 2015 – % CRP growth

CHINA: PREMIUM FOR EVERYONE

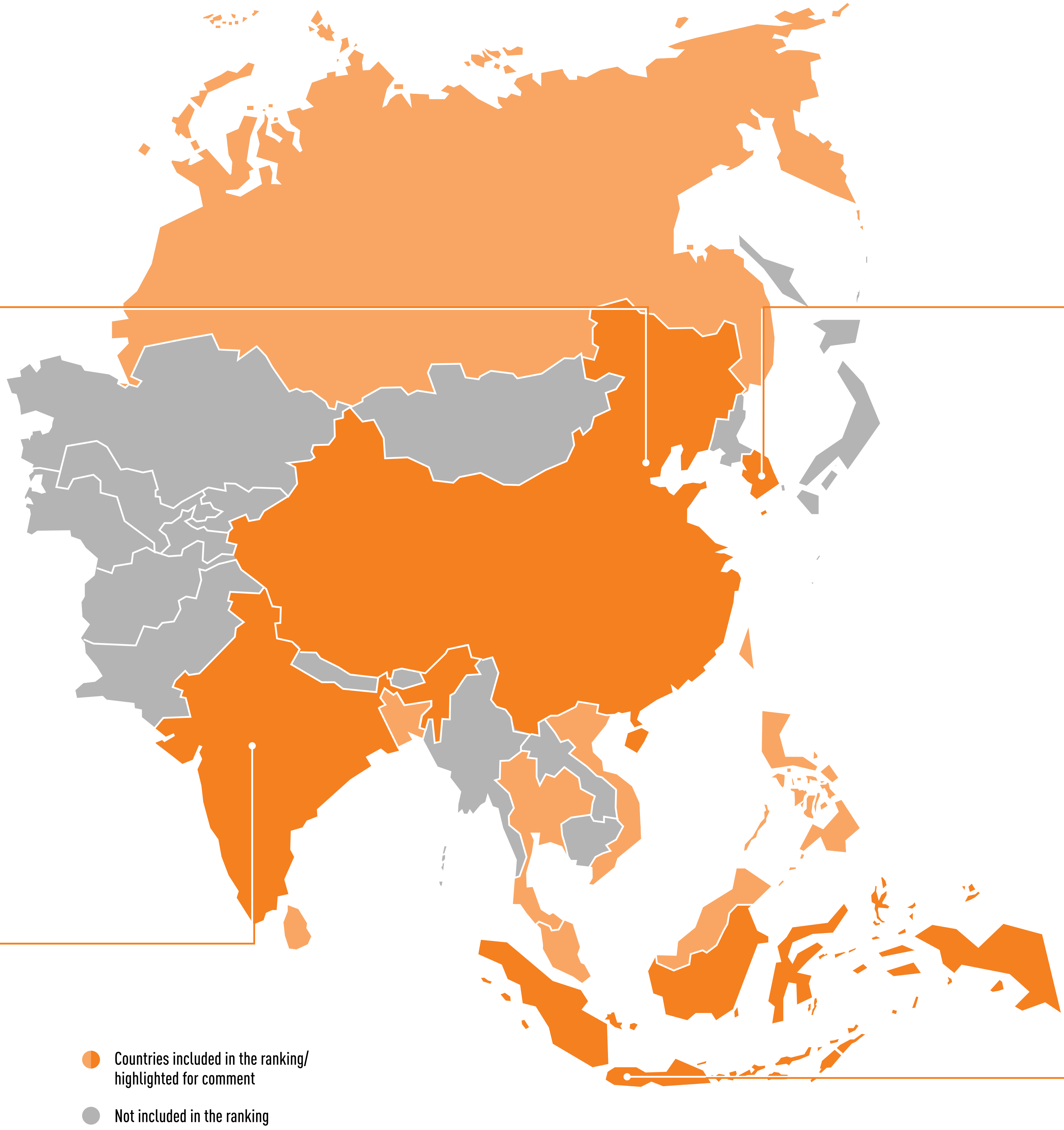
Premiumisation in Asia is more important to shoppers than ever, and brands are noticing.Amid the e-commerce boom in China, toilet tissue brand Vinda moved quickly to capture the opportunity to reach young and affluent shoppers online with its wide range of emerging categories (wet tissue and kitchen towel).

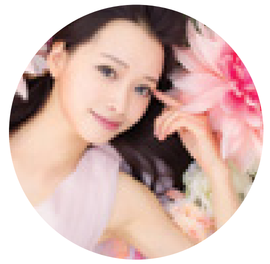
In 2015, the third year of the successful Vinda bus tour began: encouraging young families to board, play games and experience its products. Also last year, Vinda hosted a paper wedding dress challenge with well-known Chinese fashion designer Lanyu – a quirky way of changing its perception from budget toilet tissue to a premium option.

INDIA: BUILD A NATION, BUILD A BRAND

Asian consumers share a strong collective responsibility and expect brands to contribute to creating a better society. Last year, hair oil brand Nihar Naturals donated a portion of its proceeds to children's education, empowering women to do their bit in driving forward social progress.

Cooking oil Fortune meanwhile launched 'Mother Exchange', a platform designed for mothers whose kids have moved cities to study. Fortune's platform allows mothers to share recipes, so that students can prepare home meals just like mum's.





SOUTH KOREA: PREVENT WITH NATURE

Having initiated global trends like BB cream and snail facials, South Korea has been at the forefront of beauty innovations for decades. However, it is their venture in anti-pollution skincare that turned heads in 2015.

According to happi.com, sun and pollution exposure account for 90% of visible signs of ageing. Clearly, skin should be protected from pollution in the same way it is from the sun. Natural products, previously used only to maintain appearance are now stepping in as effective prevention against pollution.

Tapping into this trend, South Korea's first all-natural cosmetics brand – Innisfree – grew its CRPs by 22%.

INDONESIA: TRADITION MEETS TECHNOLOGY

In the four years that Teh Pucuk Harum (TPH) has been available, it has increased its penetration up to 48%, a huge achievement for a brand still in its infancy. TPH has blended tradition with technology to create a product that speaks to consumers' heritage, whilst meeting their modern needs. The first RTD tea brand to use tips of tea leaves as the main ingredients, TPH blends traditional flavours with clever Advanced Sterilisation Technology to ensure a highly hygienic drink without any preservatives or artificial sugar.

Future Trends

Alison Martin, Director, Kantar Worldpanel

THE 'ON DEMAND' ECONOMY

Each with unique and pioneering ideas on how benefits can be profitably delivered to consumers; service-based start-ups are disrupting established players in a number of categories.

Dining, delivery, laundry and transportation; these firms are at the forefront of new business models that combine technology and demand: saving consumers time, money and – most importantly – making life easier.

Washio offers clean clothes at the tap of a button with on-demand dry cleaning and laundry delivered to your home. Hubbub delivers the best food from over 100 small butchers, bakers and macaroon-makers in a single, simple delivery, so you can stop making-do and start eating the best food in town.

In the US, Birchbox offers a monthly subscription beauty box of samples: deftly bringing together legacy marketing techniques with actual distribution and sales.

Looking east, e-commerce is expanding and experimenting free from the shackles of legacy industries. China's social network Tencent has launched a one-stop 'shopping' platform for banking services, charity donations, e-commerce, car hire (taxi hire) as well as ticket services.

This is but the tip of a much larger iceberg. In some cases, the very idea of market economics is being turned on its head. Emerging C2B models are driven by the consumer: the buyer makes the decisions about what is on offer, and companies compete to supply these products in the fastest time and at the lowest price.

The fundamental assumptions of current FMCG structures are being challenged; from the nature of the product, its distribution and – of course – its pricing.

The manufacturers and retailers which successfully marry technology to demand will flourish in the future.

SOCIAL PURPOSE: A BUSINESS IMPERATIVE

Karen Hamilton, Global VP Sustainable Business, Unilever

Wherever you are in the world – in a developed country or an emerging country – interest is growing in the role that brands can play in making that world a better place.

Increased connectivity is bringing big social issues closer to home for many people. Whether that is political conflict, extreme weather, water scarcity or volatility in the price of food. As some of these events, which once seemed remote and abstract, start to affect people directly, they become more interested in what they can do about it.

Consumers are open to businesses and brands which provide the opportunity to take action. By buying fair trade goods, or choosing a detergent that washes at lower temperatures – the consumer themselves can positively affect the strain on the world's resources.

But the big question for marketers is whether it is affecting buying behaviour. A lot of people, particularly in consumer research will say, "Yes sustainability is very important to me." But does that make them more likely to buy something?

At Unilever, we are seeing increasing evidence that this is the case. A shift from what was once perhaps seen as somewhat niche; to a real, mainstream consumer concern. In 2014, our sustainable-living brands – those which integrate sustainability into both the purpose and the product – grew twice as fast as others, delivering half the growth in our entire portfolio.

We can't say it's causation; it's correlation. But it is becoming a really interesting performance indicator.

As the digital revolution lowers barriers to entry and as competition intensifies; brands need to look at how they differentiate successfully.

The winners won't just provide a product to buy, but a brand to buy into.

Andrew Curry,
Director, The Futures Company

MILLENNIALS: THE NEXT FRONTIER

Now reaching their mid-thirties, Millennials are finally centre stage; culturally and financially impacting on the market.

They think differently. Their adult life has been mired in economic crises: firstly a world of debt, then the crash, and now income squeeze. That combination of early economic experience and early workplace experience tends to stick with you for life; a volatile mix which produces a set of unique behaviours. It's fair to say there hasn't been a generation like it.

With its growing influence, this generation is the vanguard of a huge value shift, certainly in the richer markets, from post-modern to post-materialist. From 'stuff' to 'experience'.

It's no secret that this represents a fundamental challenge to FMCG: the industry itself was built upon fast moving, mass-produced stock.

Some supermarket brands have been much better than others at capturing this emerging consumer mood. One strategy is to rationalise: strip back the dull stuff – the ´basics´– and beef up categories where there's a bit of connoisseurship; the 'pleasure,' the experience.

I think we'll see more emphasis on brands that are able to combine value and purpose. There is headroom for growth in areas such as health, fitness and general welfare. I noticed, amid those kiosks at train stations that sell chocolate and cigarettes, something called Protein Haus. All it sells is stuff that makes you feel better. That, for me, is the future for the Millennial FMCG consumption epitomised in five or six square feet.

MARKETING TO ROBOTS: THE EROSION OF IRRATIONAL CHOICE

Amazon is a key business that has the potential to cause disruption in the FMCG space. Echo – its voice-controlled speaker – can allow people to make purchases without interacting with a screen. Alexa, the digital personal assistant embedded into Echo, can even be set to automatically reorder items when you run out, shipping them immediately though Amazon's Prime delivery service.

As voice-activated technology becomes increasingly common, brands will begin to offer more services and information through virtual personal assistants (VPAs).

Through our mobile phones as well as bespoke devices, we will become happier defaulting decisions to virtual personal assistants, particularly for more mundane items and regular purchases.

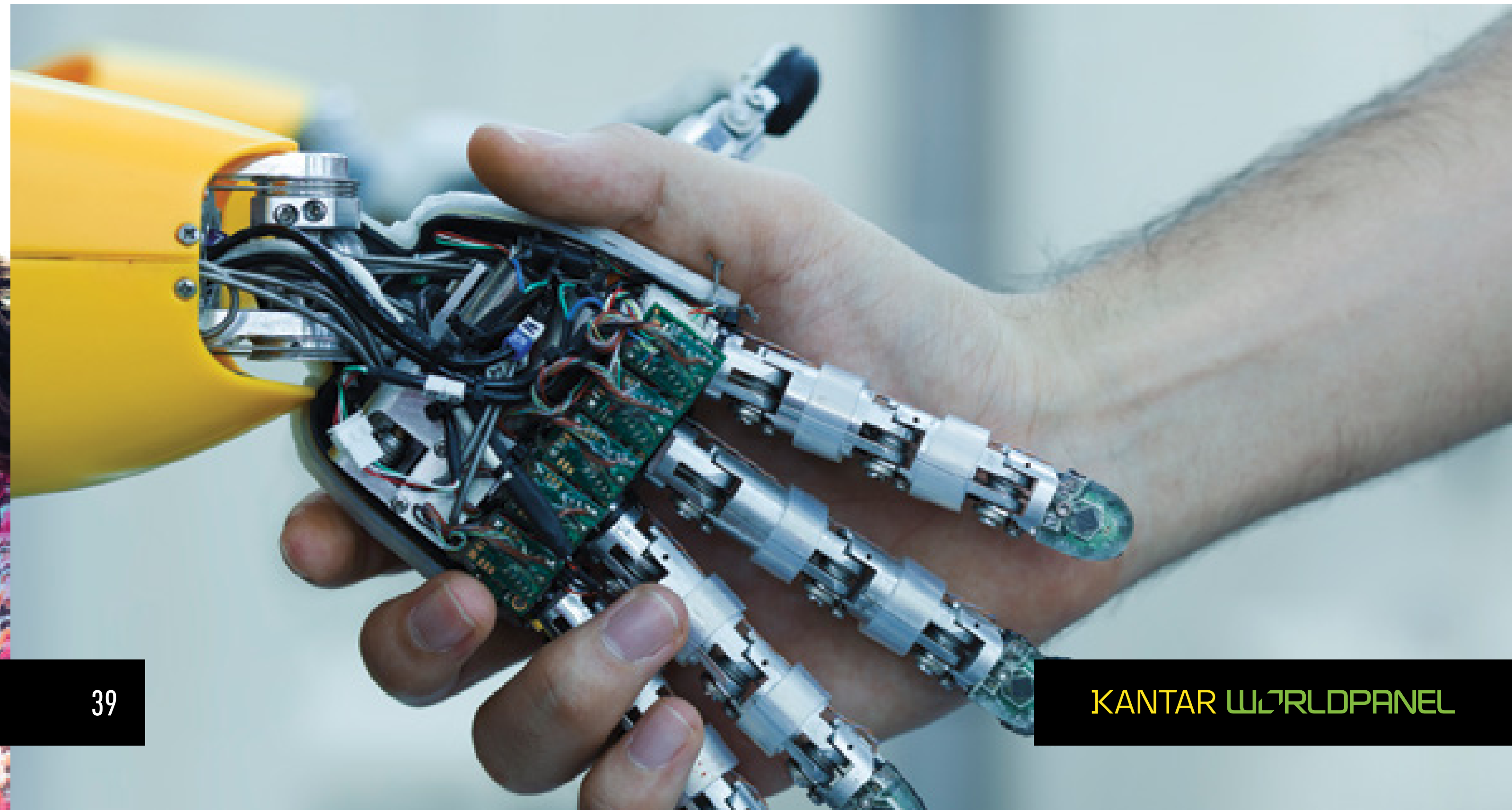
These digital helpers will know us intimately – our goals, habits and lifestyles. Which washing powder best suits our skin or what brand of toothpaste we prefer, not to mention what cheaper imitation is so close that it's indistinguishable. So, in the more distant future, expect transparency to become incredibly important for brands both as they market themselves and communicate with VPAs to provide information about product claims and ingredients.

This has interesting implications for brand loyalty, and even what the concept of brand means when a rational computer is making purchase decisions rather than an irrational human.

Will the power of brands hold strong enough to override cheaper rivals when assessed through the logical algorithms of a digital assistant? Or will brands that can engage in this new digital space stand to benefit from repeat purchases thanks to a pre-programmed loyalty?

Potentially both scenarios are true. Brands should think about joining the conversation.

Emily Hare,
Managing Editor, Contagious Magazine



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Some brands have added a statement on their packaging, advertising or corporate websites. We encourage you to use Kantar Worldpanel's Brand Footprint data source and seal. Just contact us.

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Glossary of Top 50 Most Chosen Brands

Manufacturer	Brand	Ranking	Category
Ajinomoto	Ajinomoto	23	Food
Barilla Group	Barilla	46	Food
Beiersdorf	Nivea	34	Health and Beauty
Bimbo	Bimbo	29	Food
Colgate-Palmolive Company	Colgate	2	Health and Beauty
	Palmolive	17	Health and Beauty, Home care
Danone	Danone	21	Food
	Activia	37	Food
Ferrero	Kinder	40	Food
General Mills	Pillsbury	45	Food
	Yoplait	48	Food
The Kraft-Heinz Company	Heinz	24	Food
	Kraft	22	Food
Indofood	Indomie	8	Food
Mc Cormick & Company	Mc Cormick	38	Food
Mondelez	Oreo	25	Food
	Tang	32	Beverages
Nestlé	Maggi	4	Food
	Nescafé	7	Beverages
	Nestlé	15	Food, Beverages
	Milo	27	Beverages
Procter & Gamble	Downy	13	Home care
	Tide	16	Home care
	Pantene	18	Health and Beauty
	Head & Shoulders	26	Health and Beauty
	Safeguard / Escudo	42	Health and Beauty
	Ariel	49	Home care
	Gillette	50	Health and Beauty
PepsiCo	Lay's	5	Food
	Pepsi	6	Beverages
	Quaker	31	Food
	Cheetos	35	Food
	Doritos	41	Food
The Coca-Cola Company	Coca-Cola	1	Beverages
	Sprite	20	Beverages
	Fanta	28	Beverages
The Hershey Company	Hershey's	44	Food
Unilever	Lifebuoy	3	Health and Beauty
	Knorr	9	Food
	Dove	10	Health and Beauty
	Sunsilk / Sedal / Seda	11	Health and Beauty
	Lux	12	Health and Beauty
	Sunlight	14	Home care
	Pepsodent	19	Health and Beauty
	Surf	30	Home care
	Vim	33	Home care
	Lipton	36	Beverages
	Rexona	39	Health and Beauty
	Close-Up	43	Health and Beauty
Yakult	Yakult	47	Food

All 2015 data in this report refers to MAT Q3.

Photo: Emily Estrellado from Kantar Worldpanel Philippines

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